Oracle Fusion Cloud Human Resources

Using Compensation

23D

Oracle Fusion Cloud Human Resources
Using Compensation

23D

F85793-02

Contents

ORACLE

ORACLE

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons ⑦ 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.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

ORACLE

1 Overview

Overview of Manage Compensation

Compensation management involves managing base pay, individual compensation, and workforce compensation.
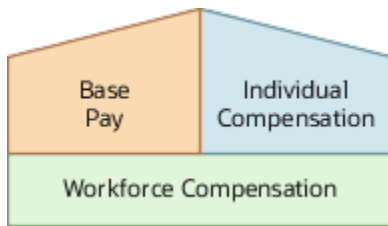
Base pay is a person's fixed salary amount. You view and adjust this amount or any component amounts or percentages over the time the person works in your organization. Individual compensation involves awards made to individuals. It also involves contributions that individuals can make to company-sponsored savings and charities. Workforce compensation involves managing budgets and compensation for groups of people.

Related Topics

- Overview of Base Pay Management
- Overview of Individual Compensation Management
- Overview of Personal Compensation Information and Contribution Management
- Overview of Workforce Compensation Management

2 Base Pay

Overview of Base Pay Management

Base pay is a person's fixed salary amount. You view and adjust this amount or any component amounts or percentages over the time the person works in your organization.

Typically, you adjust salary as part of HR actions, such as when you hire, transfer, or promote someone.

- As a line manager, you can also review and adjust base pay using the Compensation page of the My Team work area. Or you can use the Change Salary quick action.

- As a compensation manager or HR specialist, you can change salary and review proposed salary changes using the **My Client Groups** > **Compensation** work area. Or you can use the Compensation quick actions, such as Change Salary.

Salary monetary values appear by default in the currency of the element associated with the salary basis. Individual compensation award and contribution values appear by default in the currency of the element associated with the plan option. Normally, these currencies are the individual's local currency. You can also view the salary, award, and contribution currencies values in your preferred currency.

How the Salary Basis Affects Salary

Each salary record that you can manage has an associated salary basis. Here's how the configured salary basis affects what you see on the salary record.

ORACLE

Salary Basis

Frequency ○ Annualization Factor

Salary Components ○ Payroll Element

Person Salary Record

Salary: $5000 (biweekly)
-- Basic: $1000
-- Location: $4000

Annual Salary: $120000

Payroll
Processing
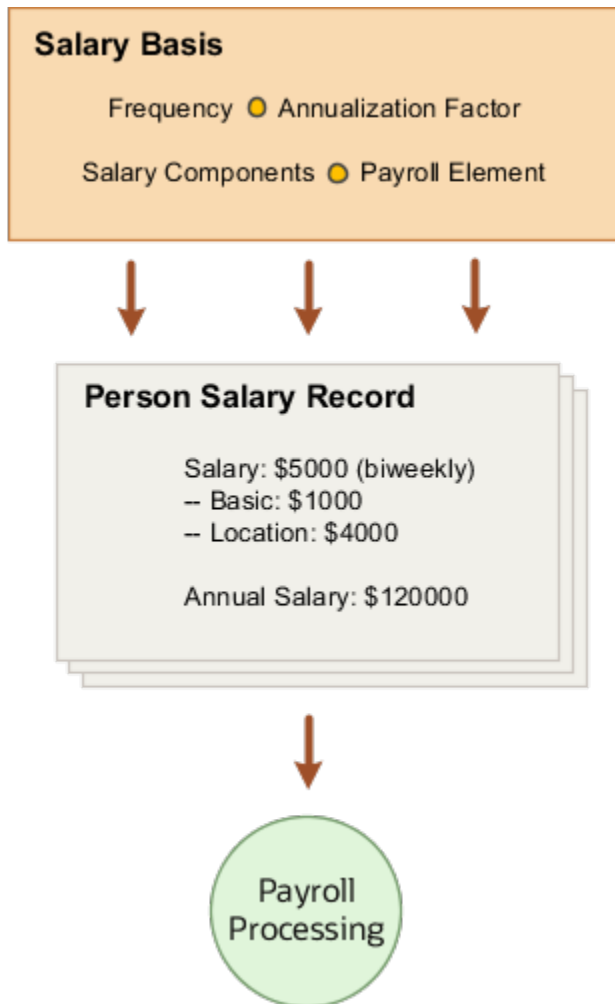
The annualized salary that you see got calculated using the currency, frequency, and annualization factor from the salary basis. Any salary components you use to itemize salary adjustments for reports, such as merit and location, also come from the salary basis. And, the salary amount you enter is held by the payroll element associated with the salary basis. The salary basis passes that amount to payroll for processing.

Typically, you don't change salary basis associated with the salary record, but here are some examples of when you might change it:

- The person's job changes from that of an individual contributor to a manager. You change their salary basis from hourly to annual.

- A union contract amendment mandates itemizing the person's pay rate. You change their hourly salary basis that doesn't use components changes to an hourly salary basis that does.

Related Topics
- How's the salary or individual compensation amount calculated when I select a different currency?

ORACLE

Annual Salary and Annualized Full-Time Salary Calculations

The annual salary and annualized full-time salary amounts on the salary get calculated using the salary amount and annualization factor.

The annualized salary calculation also uses the person's full-time equivalent (FTE). The annualization factor comes from the associated salary basis. The FTE comes from the person's employment record.

Amount	Description	Calculation
Salary	The actual salary the person receives. This amount has the same periodicity as the salary basis, such as Annual or Hourly. The numeric form of the periodicity, such as 12 or 2080, is called annualization factor.	None
Annual Salary	The salary amount that's converted to the annual periodicity for the person's FTE (full-time equivalent).	(Salary Amount * Annualization Factor)
Annualized Full-Time Salary	The salary amount that's converted to the annual periodicity and calculated as if the person's FTE was 1.0.	(Salary Amount * Annualization Factor) / FTE

Sample Calculated Salary Amounts

The FTE gives you the same annual and annualized amounts for full-time employees and different amounts for part-time employees. Here's sample salary information for a full-time employee whose FTE is 1.0 and a part-time person whose FTE is 0.6.

Periodicity	Annual	Monthly	Weekly	Work Hourly	Hourly
Annualization factor	1	12	52	2080	2920
Full-time salary amount	156,000	13,000	3,000	75	50
Full-time annual salary	156,000	156,000	156,000	156,000	146,000
Full-time annualized full-time Salary	156,000	156,000	156,000	156,000	146,000
Part-time salary amount	93,600	7,800	1,800	75	50

ORACLE

Periodicity	Annual	Monthly	Weekly	Work Hourly	Hourly
Part-time annual salary	93,600	7,800	1,800	75	50
Part-time annualized full-time salary	156,000	156,000	156,000	156,000	146,000

The salary amounts don't change for the Work Hourly and Hourly salaries of the full-time and part-time people. That's because FTE doesn't affect salaries with hourly periodicities the way it affects salaries with any of the other periodicities. The hourly rate is always the hourly rate for any FTE.

Related Topics
- How You Change a Salary to Account for a Changed FTE
- Examples of How FTE and Salary Amount Changes Work
- Examples of Annual Salary and Annualized Full-Time Salary Calculations
- Periodicity Conversion

Examples of Annual Salary and Annualized Full-Time Salary Calculations

These examples show you how the annual salary and annualized full-time salary that you see on the salary get calculated.

The legal employer standard working hours, person working hours, and FTE come from the person's employment record. You can view it using the Employment Info task for your teams or your client groups. The salary annualization factor and frequency come from the salary basis associated with the person's salary record.

Assumptions

Here are the expressions used to calculate FTE and the annualization factor for hourly rates:

- FTE = Person Working Hours per Week / Legal Employer Standard Working Hours per Week
- Annualization Factor for Hourly Rates = Legal Employer Standard Working Hours per Week * Weeks per Year

For these examples, the variable Legal Employer Standard Working Hours per Week is 40.

Person Working Hours = Standard Working Hours (40h)

Here are the hourly rate inputs when the person working hours are the same as the standard working hours, which are 40 hours.

Calculation Input	Value
Person working hours	40

Calculation Input	Value
FTE	1
Annualization factor	2080
Salary amount	15 USD

Here are the corresponding salary calculations and results.

Salary	Calculation	Result
Annual	15 x 2080	31,200 USD
Annualized Full-Time	15 x (2080/1)	31,200 USD

Person Working Hours = Standard Working Hours (35h)

Here are the hourly rate inputs when the person working hours are the same as the standard working hours, which are 35 hours.

Calculation Input	Value
Person working hours	35
FTE	1
Annualization factor	1820
Salary amount	10 USD

Here are the corresponding salary calculations and results.

Salary	Calculation	Result
Annual	10 x 1820	18,200 USD
Annualized Full-Time	10 x (1820/1)	18,200 USD

Person Working Hours < Standard Working Hours

Here are the rate inputs when the person working hours are less than the standard working hours. Typically, this applies to part-time people.

Calculation Input	Hourly Rate Value	Monthly Rate Value	Annual Rate Value
Person working hours	20	20	20
FTE	0.5	0.5	0.5

ORACLE

Calculation Input	Hourly Rate Value	Monthly Rate Value	Annual Rate Value
Annualization factor	2080	12	1
Salary amount	15 USD	5,000 USD	50,000 USD

Here are the corresponding salary calculations and results.

Salary	Annual Salary Calculation	Result	Annualized Full-Time Salary Calculation	Result
Hourly	15 x 2080 x 0.5	15,600 USD	15 x (2080/1)	31,200 USD
Monthly	5,000 x 12	60,000 USD	5,000 x (12/0.5)	120,000 USD
Annual	50,000 x 1	50,000 USD	50,000 x (1/0.5)	100,000 USD

Person Working Hours > Standard Working Hours

Here are the annual rate inputs when the person working hours are greater than the standard working hours. This can apply to people who have an on-call component to their job.

Calculation Input	Value
Person working hours	48
FTE	1.25
Annualization factor	1
Salary amount	20,000 USD

Here are the corresponding salary calculations and results.

Salary	Calculation	Result
Annual	20,000 x 1	20,000 USD
Annualized Full-Time	20,000 x (1/1.25)	16,000 USD

Reference

For more details about how FTE affects salary and example best practices for salary management, see How Salary and FTE Work Together (document ID *2168552.1*).

Related Topics

How You Change a Salary to Account for a Changed FTE

Typically, when you change the full-time equivalent (FTE) value you also need to change the salary amount.

For the adjustments to happen automatically, use an integrated task, such as Change Working Hours. You can create or change an FTE and then make salary changes in the Change Salary section. This way, the annualized full-time salary amount and salary metrics are automatically adjusted using the new FTE. When you don't create salary, the calculations could be incorrect. So we always recommend creating a salary together with FTE change.

When you created an FTE change without salary change, use the Change Salary task to create a salary change. Be sure to use the same date as the FTE change you just made.

These are the calculated values that adjust automatically:

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

Tip: To make sure that salary calculations work, the calculations treat FTEs of 0 as if the FTE is 1.

Related Topics

Examples of How FTE and Salary Amount Changes Work

These examples show how a full-time equivalent (FTE) change affects an annual salary. The effect depends on the salary basis frequency and whether you use components to itemize the salary adjustment.

In both examples, you make these changes:

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

Or make an assignment and a salary change together starting on July 1, 2019 using the Change Working Hours task.

ORACLE

Changes to a Monthly Salary Basis

Because you're using the same start date, the salary calculations automatically adjust all the salary amounts and related metrics using the new 0.75 FTE.

Salary Info	Previous Value	New Value
FTE	1	0.75
Salary Amount	10,000	7,500
Adjustment Amount	NA	0
Adjustment Percentage	NA	0
Annual Salary	120,000	90,000
Annualized Full-Time Salary	120,000	120,000
Salary Range	10,000-20,000	7,500-15,000
Compa-Ratio	66.67	66.67
Range Position	0	0
Quartile	1	1
Quintile	1	1

Changes to an Hourly Salary Basis

The calculations use the 2080 annualization factor and the new 0.75 FTE. The calculations don't automatically adjust the salary amount because FTE doesn't affect hourly periodicities the way it affects all other periodicities.

Salary Info	Previous Value	New Value
FTE	1	0.75
Salary Amount	50	50
Adjustment Amount	NA	0
Adjustment Percentage	NA	0
Annual Salary	104,000	78,000
Annualized Full-Time Salary	104,000	104,000
Salary Range	10,000-20,000	7,500-15,000
Compa-Ratio	66.67	66.67
Range Position	0	0
Quartile	1	1
Quintile	1	1

ORACLE

Changes to an Annual Frequency Incremental Salary Basis

When you change the FTE for an incremental salary basis with an annual frequency, such as from 1 to 0.75, the salary info adjusts. And the incremental component values get set to 0.

Salary Info	Previous Value	New Value
FTE	1	0.75
Salary Amount	100,000	75,000
Annual Salary	100,000	75,000
Annualized Full-Time Salary	100,000	100,000
Salary Range	50,000-1500,000	37,500-112,500
Compa-Ratio	100	100
Range Position	50	50
Quartile	3	3
Quintile	3	3

Incremental Components Table

Incremental Component	Previous Value	New Values
Adjustment	10,000	0
Cost of Living	5,000	0
Equity	5,000	0
Location	10,000	0
Market	10,000	0
Merit	60,000	0

Related Topics
- How You Change a Salary to Account for a Changed FTE

Salary Adjustment Amount and Currency Changes

When you change a salary amount, the adjustment amount shows the numeric difference between the current and proposed salary amounts. The adjustment amount doesn't account for any currency conversions.

ORACLE

For example, if you change a person's salary from 68,000 USD to 60,000 EURO, the adjustment amount is -8,000. The adjustment amount is negative even though 60,000 EURO is about 73,200 USD at a conversion rate of 1.22 USD to 1 EURO.

How You Can See Salary Changes That Need Your Approval

Use the Compensation Info quick action in My Teams or My Client Groups, depending on your role.

If you submitted the change, you can withdraw it. If you're the approver, you can approve or reject the change. If you're an observer, then you get an informational notice.

Overview of Salary History

As a compensation manager, you can view and manage assignment salaries with amounts that people entered directly or using components.

More specifically, you can view and compare salaries, and see the summary and details of individual salaries. You can also create, edit, or delete multiple salaries and submit all your changes together for approval. And you can view who created and updated salary details, and when.

To open the Salary History page, you can use the **My Client Groups** > **Salary History** task or quick action. On the **My Client Groups** > **Compensation Info** page, you can use the Actions menu, Salary History option.

When you open the Salary History page, it recalculates the analytical values of all the salary records so you see accurate analytics in each row. Thus when you submit changes from this page that you opened, the Updated By field identifies you in all the salary records. To change a single salary record, use the Compensation Info or Change Salary task. That way you don't recalculate data for all salary records.

How You Can Change Multiple Salaries at One Time

You can use the integrated workbook in the Compensation work area to view and edit salaries for multiple people.

1. Use the Export Salaries task to set your export parameters.
2. In the Edit Preview section, click **Prepare in Workbook** to generate the workbook.
3. Make your edits in the workbook.
4. Upload your changes.

ORACLE

Edit Salaries in the Integrated Workbook

You can edit salary data using an integrated Microsoft Excel workbook. You can edit salaries, but you can't change the associated salary bases. If you configured differentials, the workbook calculates salary ranges by considering the corresponding differential profiles.

Download Salaries

1. In the tasks panel tab, click **Download Salaries**.
2. Select the relevant download parameters. Be sure to include the latest salary start date and local currency if you plan to upload your changes.

   The currency shown comes from the input value of the payroll element associated with the salary basis.
3. To view the data that matches your download parameters, click **Preview Download**.
4. To generate the workbook and populate it with the data that matches your download parameters, click **Prepare in Workbook**.

Edit Salary Data

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

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

Upload Salary Changes

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

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

Validate Changes

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

Resolve Errors

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

1. Rolls back the change in the application.
2. Sets the workbook row status to Update failed.

ORACLE

3. Continues to the next workbook row.

To view and resolve an error:

1. In the Status field, double-click **Update failed**.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

Related Topics

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

Can I copy salary as part of a global transfer?

Yes, if the transfer is within the same LDG, and the salary basis associated with the salary is of type user determined.

How do I maintain a full-time salary amount?

You can't. You're required to maintain the actual salary paid at the respective full-time equivalent (FTE). You can see annual values at the FTE and annualized full-time salary.

You can also include the annual and annualized fields in Oracle Transactional Business Intelligence (OTBI) reports.

ORACLE

3 Differentials for Salary Ranges

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

Salary metrics include minimum, maximum, midpoint, compa-ratio, range position, quartile, and quintile. Metric calculations use the grade rate and differential profile from the person's salary basis, as shown here. They also use the full-time equivalent (FTE) value from the employment record.
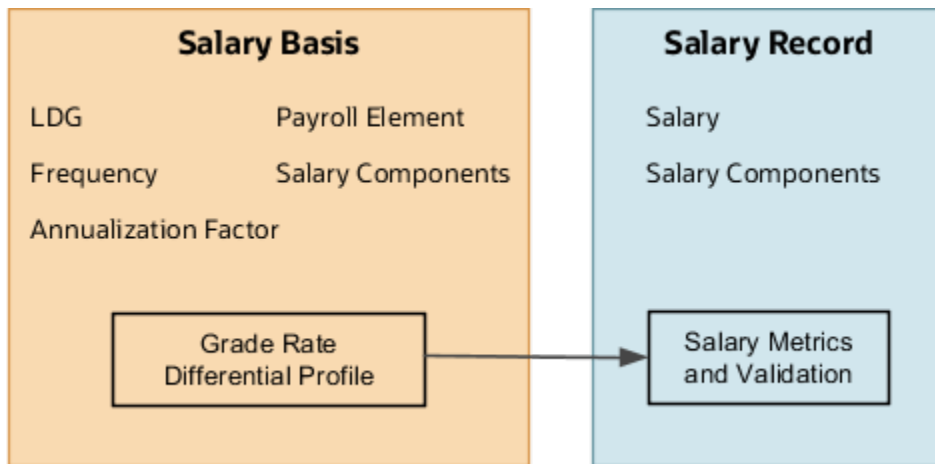
The optional grade rate provides the information for the person's base salary range. The optional differential profile provides the multiplier that calculations use to automatically adjust the person's salary metrics. Or, it provides an alternate grade rate to use instead of the grade rate associated with the salary basis. The differential profile has multipliers configured for one of these criteria:

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

Profiles with the compensation zone or compensation zone and business unit criteria might have alternate grade rates configured instead of multipliers. If the person's location is blank or not defined in the differential profile, metric calculations use the information from the grade rate.

For example, you transfer someone with an annual salary amount of 120,000 USD and the US Prof3 Annual grade rate to a new location. The person's salary basis includes a differential profile with multipliers or alternate grade rates by location. Here are the salary metrics for their original and new locations, which have differentials of 1 and .8, respectively.

Salary Metrics	Original Location (1)	New Location (.8)
Annual Salary	120,000	120,000

ORACLE

Salary Metrics	Original Location (1)	New Location (.8)
Range (USD)	100,000 to 200,000	80,000 to 160,000
Midpoint (USD)	150,000	120,000
Compa-Ratio	80	100
Range Position	20	50
Quartile	1	3
Quintile	2	3

Related Topics
- Example of How a Location or Compensation Zone Differential Applies
- Example of How a Differential with Lower Limits Applies
- Example of How a Differential with Grade Rate Overrides Applies
- Date Used in Salary Metric Calculations

Date Used in Salary Metric Calculations

The salary amount is dated while the full-time equivalent (FTE), grade, grade rate, and differential profile are effective dated. Thus, salary can have logic for multiple combinations of FTE, grade, grade rate, and differential to apply for different time periods.

So, how are salary metrics, such as compa-ratio, range minimum, and range maximum, calculated? The metric calculations use a reference date and here's how it's identified:

- If the salary start and end dates are in the past, use the salary end date.
- If the salary start date is in future, use the salary start date.
- If the salary started in the past and the end date is in the future or ongoing, use the current system date.

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

Example of How a Location or Compensation Zone Differential Applies

You're hiring two full-time people to work in New York and Miami. They both have the Individual Contributor 3 grade and their salaries include the US Individual Contributors salary basis and differential profile.

- The grade rate frequency is Annually.
- The differential profile criteria is by either location or compensation zone and the differential for New York is 1.2 and for Miami is .8.

ORACLE

Example Metrics

The proposed salaries for these new hires are 130,000 and 100,000, respectively. Here are the base metrics from their grade rate and the metrics calculated with their differentials.

Salary Metrics	Base from Grade Rate	New York Hire at 130,000 (1.2)	Miami New Hire at 100,000 (.8)
Range (USD)	100,000 to 200,000	120,000.00 to 240,000	80,000 to 160,000
Midpoint (USD)	150,000	180,000	120,000
Compa-Ratio	80	72.22	83.33
Range Position	20	8.33	125.00
Quartile	1	1	2
Quintile	2	1	2

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

Example of How a Differential with Lower Limits Applies

You're hiring two full-time people to work in New York and Miami. They both have the Individual Contributors 3 grade and their salaries include the US Individual Contributors salary basis and differential profile.

- The grade rate frequency is Annually.
- The differential profile criteria is by either compensation zone or compensation zone and business unit, and includes lower limits to enforce statutory requirements. For New York, the differential is 1.2 and the lower limit is 140,000. For Miami, the differential is .8 and the lower limit is 105,000.

Example Metrics

The proposed salaries for these new hires are 130,000 and 100,000, respectively. Here are the base metrics from their grade rate and the metrics calculated with their differentials. Normally the minimums for New York and Miami are 120,000 and 80,000, respectively. Because the differential profile includes lower limits, the metric calculations automatically adjust the minimums to the specified limits. As a result, both proposed salaries are below the minimums.

Salary Metrics	Base from Grade Rate	New York Hire at 130,000 (1.2)	Miami New Hire at 100,000 (.8)
Range (USD)	100,000 to 200,000	140,000 to 240,000	105,000 to 160,000
Midpoint (USD)	150,000	180,000	120,000
Compa-Ratio	80	72.22	83.33
Range Position	20	8.33	25
Quartile	1	1	2

ORACLE

Salary Metrics	Base from Grade Rate	New York Hire at 130,000 (1.2)	Miami New Hire at 100,000 (.8)
Quintile	2	1	2

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

Example of How a Differential with Grade Rate Overrides Applies

You're hiring two full-time people to work in New York and Miami. They both have the Individual Contributor 3 grade and their salaries include the US Individual Contributors salary basis and differential profile.

- The grade rate frequency is Annually.

- The differential profile type is Grade Rate and the criteria is by either location or compensation zone.

Example Metrics

The proposed salaries for these new hires are 130,000 and 100,000, respectively. Here are the base metrics from their US Individual Contributors grade rate. The calculated metrics use the grade rates identified by their differential profile.

Salary Metrics	US Individual Contributors	US NY Contributors at 130,000	US Miami Contributors at 100,000
Range (USD)	100,000 to 200,000	120,000.00 to 240,000	80,000 to 160,000
Midpoint (USD)	150,000	180,000	120,000
Compa-Ratio	80	72.22	83.33
Range Position	20	8.33	25.00
Quartile	1	1	2
Quintile	2	1	2

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

ORACLE

4 Individual Compensation

Overview of Individual Compensation Management

You can award variable compensation to individuals outside the regular compensation cycle. Examples of variable compensation include a spot bonus, an education reimbursement, or a car allowance. You can also start and change recurring payments, and see past award amounts.

You manage individual compensation in Compensation sections of HR actions, such as when you hire, transfer, and promote someone.

- As a line manager, you can also use the Individual Compensation quick action for your team.

- As a compensation manager or HR specialist, you can also use the Individual Compensation and Administer Compensation quick actions for your client groups.

To view monetary amounts in your currency instead of the plan currency, you can use the Currency drop-down list.

Related Topics
- How's the salary or individual compensation amount calculated when I select a different currency?

Compensation History

View the last 5 years of individuals' salary, stock, other compensation, and recurring payments using the View Compensation History task or quick action. To view history across assignments, use the Business Title drop-down list.

Compensation Info

You can see a person's entire compensation information for each of their assignments using the Compensation Info quick action. For example, review current salary, other compensation, stock shares, and recurring and onetime payments. Also review total compensation and change statements.

> **Tip:** The Recurring and One-Time Payments section has payroll elements configured using the Compensation History task. It doesn't have payroll elements configured in individual compensation plans.

You can view document attachments for approved allocations here and any for proposed allocations, on the person's Document Record page. Your role and the data security configuration for the document of record affect the documents that you can access.

ORACLE

Examples of Salary Growth Rate Calculations

These examples show you how compensation history calculates the salary growth rates.

Type	Description	Calculation
Average annual growth rate	The statistical average of the total percentage increase from January to December of each full year	SUM(Annual Growth Rate per Year in Period) / Number of Years in Period
Cumulative Growth Rate	The total percentage of salary change over the period	(Ending Salary for Period - Starting Salary for Period) / Starting Salary for Period

Salary Change Information

These example starting and ending salaries span 5 years and show the corresponding annual growth rates. The 3-year calculations use the information for 2017 through 2019.

Year	Starting Salary	Ending Salary	Annual Growth Rate
2015	38,000	41,000	7.89
2016	41,000	43,000	4.88
2017	43,000	49,000	13.95
2018	49,000	54,000	10.20
2019	54,000	54,000	0.00

Example Calculations

Here's how the calculations look using the sample information.

Type	Period	Example Calculation	Example Growth Rate
Average annual growth rate	3-year	(13.95 + 10.20 + 0.00) / 3	8.05
	5-year	(7.89 + 4.88 + 13.95 + 10.20 + 0.00) / 5	7.38
Cumulative Growth Rate	3-year	((54,000 - 43,000)/43,000) * 100	25.58
	5-year	((54,000 - 38,000) / 38,000) * 100	42.10

ORACLE

Can I copy individual compensation allocations as part of a global transfer?

The responsive global transfer flow that includes the individual compensation section automatically copies the allocations from the source legal employer according to certain conditions.

Here are the conditions:

- The LDG of the element linked to the individual compensation plan option is the same for both legal employers.

- The individual compensation plan has Restrict Plan Access set to No. Or, plan access includes the Global Transfer action.

The automatic copy happens only if the local and global transfer action includes the individual compensation section, and you visit the section.

You can't copy individual compensation when you use the Mass Legal Employer Change process.

How's the salary or individual compensation amount calculated when I select a different currency?

Currency conversions use the currency conversion rates maintained for the Corporate rate type. Currency conversions for total compensation statements and Oracle Transactional Business Intelligence reports also use the Corporate rate type.

You maintain conversion rates using the Manage Daily Rates task in the Setup and Maintenance work area.

5 Personal Compensation Information and Contributions

Overview of Personal Compensation Information and Contribution Management

You can view your compensation information using the My Compensation task. You can manage your enrollments and contributions for company-sponsored savings and charitable plans using the Personal Contributions task.

- View information about your salary, personal contributions, and any company stock grants for each of your assignments using the Business Title field. The recurring and onetime payments section has only the payroll elements that are on the Compensation History page, but not configured as individual compensation plans.

- Open total and workforce compensation statements that merge your compensation information for easy viewing and printing. The type of information that statements contain varies depending on how your company configures compensation. Not everyone can view these statements.

You can also view personal compensation and manage contributions using Compensation quick actions.

View My Compensation Information

You can view your compensation information, personal contributions, and total compensation statements.

1. Here's how you can view your compensation information and personal contributions:
   a. Click **Me** > **Personal Information** or **Me** > **Quick Actions** > **My Compensation**.
   b. On the My Details page, click **Compensation**.

      You can use the Compensation page to see your salary information, such as your annual salary, salary range, and last salary change date and percentage. You can see your prior salaries, other compensation, and recurring and one-time payments. You can also see your personal contributions to company-sponsored savings and charitable plans.
2. Here's how you can view your total compensation statements. The statement information depends on how your organization configures compensation. Not everyone can view compensation statements.
   a. Click the **Total Compensation Statement** quick action.

      You can see details of your compensation, such as cash compensation and benefits, in the Summary section. You can also see it in the Total Compensation Statement section on the My Compensation page.
   b. To print your statement, click **View Printable Statement**.

6 Workforce Compensation Management and Plans

Overview of Workforce Compensation Management

As a line manager, you can allocate compensation, such as merit increases or stock grants, to groups of people on a focal, anniversary, or periodic basis. You can also promote people, rate their performance, and communicate compensation changes.

You can use models to automatically calculate compensation, and even allocate it. You can analyze proposed changes for equity among peer groups and by manager. You can also analyze how these proposals align with the market. And you can analyze how proposed changes align with organizational compensation strategies for performance.

If you're a compensation manager, you can do these same tasks for oversight, to override, and to act as proxy. If you're a compensation administrator, you process and transfer approved workforce compensation to people's HR records.

Line and compensation managers can manage workforce compensation using the **My Team** > **Workforce Compensation** task. Compensation managers and administrators can use the **My Client Groups** > **Compensation** task.

Overview of Workforce Compensation Plans

Use workforce compensation plans to allocate budgets to managers and compensation to groups of people during a compensation cycle. The plans are highly configurable, so the specific tasks and information you see depend on the plan setup and your role.

For example, one plan configuration has budgeting enabled so includes the **Manage Budget**s task. It also includes the compensation tasks **Adjust Salary**, **Allocate Bonus**, and **Allocate Stock**, the communications task **Communications**, and the approvals task **Approve**.

Another plan configuration doesn't have budgeting enabled, so it doesn't include the **Manage Budgets** task. It does include the compensation task **Allocate Award**, the communications task **Statement**, and the approvals task **Approvals**.

Further, if you're a compensation administrator, your **Manage Budgets** page might include the **Adjust Budgets** button. If you're a line manager, your **Manage Budgets** page won't include the button.

Depending on plan configurations, you might use many of the workforce compensation actions, tasks, and information covered in these chapters regularly. Others you don't use at all, or very infrequently, especially if you're a line manager with no managers reporting to you.

ORACLE

Primary, Secondary, and Other Workforce Compensation Plans

Your workforce compensation responsibilities vary by plan type. To see your entire list of plans by plan type, on the plan page header, click the **Viewing plan X of Y** link. For example, the link could be **1 of 7**.

▶ **Watch video**

Primary Plans

You're responsible for reviewing and finalizing your changes, then submitting them for approval.

Secondary and Other Plans

You can get secondary and other plans if the primary plan manager delegates at least one of their people to you. You can't submit changes to secondary or other plans for approval. Depending on the plan configuration, you can suggest changes to the primary plan manager or just view the plan.

How You Can Switch to Your Managers' Plans

If the plan has switching enabled and you have subordinate managers, you can switch from your plans to theirs. Use the choice list on the Workforce Compensation page header.

How You Switch Between Workforce Compensation Plans

By default, when you open the Workforce Compensation page for your team, you see the first plan in the list. Use the **Next Plan** and **Previous Plan** icons on the page header to move among plans in your list.

To see the entire list of plans by plan type, click the **Viewing plan X of Y** link. For example, the link could be **1 of 7**. You can then click any plan in the list to open it.

Depending on the plan configuration, if you have multiple assignments, and worksheets for each assignment, you can see the assignment information in the plan header.

ORACLE

General Structure of Workforce Compensation Plans

Here are the main areas you see in your workforce compensation plans.

▶ **Watch video**

Header Information

All plans include a header where you can see key information, including plan status, last approval action, access level, and due date. The header also includes the icons that you use to view action history and manager status reports. Depending on the plan configuration and your role, the header can also include the **Submit for Approval** button.

Task Links

Plans can have links for budgets, promotion, compensation, approval, communications, and performance tasks. They can also have models and reports tasks. Each task link opens the corresponding plan worksheet. Each plan has at least one task link and can have more. They can even have multiple links for the same type of task. For example, a plan can have links to separate compensation tasks that you use to allocate salary and grant stock.

Summary Information

After the task links, a plan might include a summary area with various analytics. For example, analytics might show unused plan budget and average allocation amounts as well as how many of your subordinate managers have submitted their changes. Not every plan includes summary information but when it does, the information varies according to the specific configuration of that plan and your role. For example, if you manage budgets, you might see unused budget amounts and which of your subordinate managers have submitted their changes. If you don't have any subordinate managers, you won't see analytics about submitted changes.

Action History for Workforce Compensation Plans

You can see the approval chain and action history for any of your team's workforce compensation plans on the Action History page. The action history includes who took the action and any provided comments. Here's an example:

▶ **Watch video**

Action	Action Taken By
Budget available 1/10/21 5:01 PM	NA
Budget available 1/10/21 5:01 PM	NA
Budget available 1/10/21 5:01 PM	NA

ORACLE

Action	Action Taken By
Work in progress 1/10/21 5:43 PM	Chris Smith
Submitted 1/10/21 6:15 PM	Chris Smith

To open the page, on the plan header, click the **Action History** icon.

7 Task Worksheets for Workforce Compensation Plans

Overview of Workforce Compensation Worksheets

You make your budget and compensation allocations, performance evaluations, promotions, and approvals using task worksheets. You also use the worksheets to communicate compensation changes. Just like the plans that contain them, worksheets are highly configurable.

▶ **Watch video**

The available actions, analytics, and data depend on the worksheet setup and your role. For example, you're responsible for completing task worksheets for your primary plans. Depending on the plan setup, you can only view task worksheets for secondary plans. Or, you might be able to make recommendations. If a plan includes the **Manage Budget** task, you might be able to change the access level for a budget pool using the **Actions** menu. Or, you might have to change the access level for each row in the worksheet individually.

Depending on the task worksheet configurations for the plan, you might use many of the actions and information covered in these chapters regularly. Others you don't use at all, or very infrequently, especially if you're a line manager with no subordinate managers.

Types of Task Worksheets

Workforce compensation plans can include budgets, promotion, compensation, approval, communications, performance, and model task worksheets. They can even include multiple worksheets for the same type of task.

For example, a plan setup could have separate worksheets for the **Adjust Salary**, **Allocate Bonus**, and **Grant Stocks** compensation tasks. Another plan setup could have a single **Allocations** compensation task.

The first time you go to open a budget worksheet, you might need to select a budget method for the worksheet. For example, you can specify that you'll pass down budgets to only your direct subordinate managers. Or, you can pass down budgets to all of your subordinate managers. Your selection determines the worksheet that opens. On the worksheet itself, you can change the budget method, as needed.

> **Tip:** To improve worksheet performance when you switch the detail table from list to tree, set your team filter to an option other than **All workers**.

ORACLE

Assignment Segment Tables in Compensation, Detail Table Only, Performance, and Promotion Worksheets

You can see prorated values for people whose assignments changed during the workforce compensation cycle in a separate assignment segments table. Each row of the table shows you the information for that segment of the cycle.

For example, this person's bonus amount is calculated according to their eligible earnings and target percentage for 2 segments of time during the workforce compensation cycle.

Start Date	End Date	Salary	Currency	Days Eligible	Proration Factor	Eligible Earnings	Target %	Target Amount	Modifier	Payout Amount
Jan 1	Mar 14	75,000	USD	73	.2 (73/365)	15,000	15	2,250	1.1	2,475
Mar 15	Dec 31	82,500	USD	292	.9 (292/365)	66,000	20	13,200	1.1	14,520
										16,995

The table footer shows the summed segment values, in this case payout amounts. When you click **Apply**, the total passes to the read-only worksheet column specified in the worksheet setup. The **Apply** button is only available if at least one row in the assignment segment table has a status of **Eligible**.

> **CAUTION:** You can't save your changes in the assignment segments table by clicking **Save** or **Save and Close** for the worksheet.

To see the Assignment Segments table, you need to view the detail table content as a list, and not a tree. If a segment has an **Ineligible** status, you can only read the values for that segment. Also, you can only read the values when the person's assignment is processed or partially processed. And then only if you have read-only access to the worksheet.

Compensation administrators can see all assignment segment columns, even columns that you, as a manager, don't have visibility for when they administer workers. They can also update segment eligibility and values.

Restrictions

Here's what you can't do with the enabled worksheet assignment segments:

- Reorder columns, apply filters, or sort rows in the assignment segments table. The table columns appear according to the assignment segments setup.
- Freeze columns in either the detail or the assignment segments table.
- Export the detail table content using the Export to Excel icon.
- Include assignment segment content using Manage in Spreadsheet.

ORACLE

How You Switch Between Task Worksheets

You open the first worksheet by clicking a task link on the workforce compensation plan. Here's how you can switch between task worksheets after that.

▶ **Watch video**

Budget Worksheets

On the **Manage Budgets** page, click the link for the budget that you want to review. When you finish with that worksheet, you can return to the Manage Budgets page and open another worksheet or return to the plan page.

All Other Worksheets

On that task worksheet page, you can use the choice list in the page header to move between all plan worksheets except the budget worksheets. Or, you can return to the plan page and click another task link.

Header Information for Task Worksheets

The key information you can view in the headers of the task worksheets in your plans varies by task type, worksheet setup, and your role.

▶ **Watch video**

> **Tip:** You can change the worksheet currency from the plan currency to your preferred currency. Use the switcher on the worksheet page header. This switch doesn't affect allocations, which occur in the worker's local currency.

Budget

You can view key information in budget worksheet headers, including budget and budget distribution amounts and percentages.

Compensation

You can view key information, such as the amounts and percentages for the overall, allocated, and remaining budgets in the compensation worksheet headers. Use scoreboard, table, and analytic views.

- The scoreboard and analytics views show you the key information for one compensation component at a time, and for everyone reporting up to you. You can move between the components using the **X of Y** link, for example **1 of 3**. Or you can use the **Previous** and **Next** icons.

- The table view has a separate summary row for each of the plan compensation components and the key information is only for your direct reports.

ORACLE

Performance

You can view key summary information and analytics in performance worksheet headers, such as rating and target percentage minimum and maximum.

Promotion

You can view summary information in promotion worksheet headers, such as the number of promotions, percentage of people promoted, and deviation from company target. See the summaries by various categories, including team, country, department, current job, years in job, performance ratings, and organization averages.

Overview of Table Filters on Task Worksheets

In the list view, you can more easily identify subsets of people whose allocation you want to change using filters. Filters don't work with the tree view because they can affect higher levels in the tree and thus break the tree.

▶ **Watch video**

The filters that you see when you click the **Filter** icon on the toolbar depends on the worksheet setup. For example, your worksheet might have filters for country and job.

> **Tip:** You can use the **Personalize Layout** icon to have the table filters automatically open when you open the worksheet.

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

You can also filter your worksheet using alerts with the **Filter** icon. Or you can hover over an alert icon and select **Filter workers with this alert**.

If you don't see any filters, contact your compensation administrator to have them enabled. If the existing filters aren't what you need, you can create your own filters using the columns available in the worksheet. You can create your own filters only if the plan setup includes advanced filters.

Create Advanced Filters for Your Worksheets

If the existing filters aren't what you need, you can create your own using the columns available in the worksheet.

▶ **Watch video**

1. On the worksheet toolbar, click the **Filter** icon.
2. On the row with any configured filters, click the **Edit Advanced Filters** icon.

ORACLE

3. On the Edit Advanced Filters page, click the **Add** icon.
4. In the added row, enter a descriptive name, such as **Bonus Under Target**.
5. Build the filter conditions.
    a. Click the **Edit** icon.
    b. On the Edit Condition dialog box, click **Build Condition**.
    c. Select the column you want to use for the filter, such as **Bonus Amount**.
    d. Select the operation, such as **Is less than**.
    e. Enter a fixed value. Or, you can compare the values in the selected column with values in another column. For example, you switch to columns and select **Bonus Target Amount**.
    f. To add more conditions, click **Next**.
    g. When you finish creating your condition, click **Done**. After you create a filter, you can edit it, add additional conditions, or delete any of the existing conditions.
6. When the condition is ready, validate that it works. If you don't get any errors, the filter is ready to use.
7. On the information message, click **OK**.
8. On the Edit Condition dialog box, click **Apply**.

   On the filter bar of the table, you see the **Advanced Filters** choice list. It includes the filter you just created.

Statuses of Workforce Compensation Plans

As you move through a workforce compensation cycle, your plan status changes. Here's what each status indicates.

Status	Progress
Budget Available	You have a budget.
Not Started	You haven't saved changes to any task worksheets in the plan.
Work in Progress	You saved changes to at least one task worksheet in the plan.
Submitted	You submitted your plan changes for approval.
In Approvals	Your manager approved your plan changes.
Fully Approved	The highest-level manager or approver in your approval hierarchy approved your plan changes.
Processed	The Transfer Data to HR process ran and posted all changes to HR and payroll.

Reasons You Can't Update Your Budgets or Other Worksheets

You can't always update your budgets or other task worksheets. Here are the possible reasons why.

- You might not have a published budget, the budgets were calculated automatically, or they were distributed directly to individuals.

- You have read-only access to the plan or the task worksheet. Or, the worksheet update date for the plan cycle is past or blank.

- You already submitted your plan changes for approval.

Manage Task Worksheets in the Integrated Workbook

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

Download the Workbooks

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

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

Edit Budget or Workbook Data

After the download completes, you can change data in cells with a white background. The workbook adds a symbol in the **Changed** cell to mark the rows where you changed or entered data in one of the white cells. When you upload your changes, the application recalculates the percentage of eligible salary column using the compensation amount you entered in the workbook.

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

Upload Budget or Worksheet Changes

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

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

Validate Changes

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

ORACLE

Resolve Errors

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

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

To view and resolve an error:

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

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

ORACLE

8 Actions for Task Worksheets

Budget Worksheet Actions

Here's a comprehensive list of the budget worksheet actions. They apply to all of your subordinate managers, direct reports and otherwise. You can apply some or all of them depending on the worksheet setup and your role.

▶ **Watch video**

Action	Location	Description
Access Level	Actions menu	Set the access level, such as no access, no updates allowed, or updates allowed, for all rows of the worksheet.
Access Level	Worksheet row	Set the access level, such as no access, no updates allowed, or updates allowed, for that row of the worksheet.
View Audit Trail	Actions menu	View any changes made for the person selected on the worksheet and any related budget changes. Or view the changes you made to the worksheet. You can also export this data to a spreadsheet using the icon on the search results toolbar.
View Currency Conversion Rates	Actions menu	View the source currency and all of the currencies and conversion rates applied to amounts on the worksheet. Also see the effective date for the conversion rates.
Publish to Managers	Publish to Managers menu	Specify whether to publish or unpublish the budgets for the selected managers or all of your direct subordinate managers. Or, publish using both options. For example, you select a subordinate manager to get a budget now. Then you publish the rest of the budget to all your other subordinate managers later. When you publish to all managers, you're publishing to all of your direct subordinate managers. They would then publish budgets for their direct subordinate managers, on down the hierarchy until the manager has only individuals reporting to them. Those managers allocate their budget directly to their people.
Models	Toolbar	Create, open, or apply a model and use it to publish the budget. A later chapter covers these actions.

ORACLE

> **Note:** When you use the tree view on the worksheet, you won't see the simple export option if your team has more than 500 members. You also won't see the options to expand or collapse all.

No Budget

If you don't have a budget, you can't make any allocations.

Zero Budget

If the budget is 0, then you have no budget but you can still make allocations. Any allocations you make show as negative values against the available budget.

Related Topics
- Types of Task Worksheets
- Header Information for Task Worksheets

Additional Ways to Publish Budgets

You can also publish budgets using the **Adjust Budgets** button on the Manage Budgets page that you used to open a budget worksheet. This button is available only if you're a compensation manager acting on behalf of a line manager.

Or on the landing page of the workforce compensation plan, you can switch to the manager whose budget you want to publish.

Related Topics
- Budget Worksheet Actions

Compensation and Promotion Worksheet Actions

Here's a comprehensive list of the compensation and promotion worksheet actions. They apply to the people listed on the worksheet. On compensation worksheets, you can change the people using the team switcher on the toolbar.

▶ **Watch video**

For example, you're a manager and you change the people from your direct reports to the people two levels down. You can also search for specific people by name. You can apply some or all of the actions depending on the worksheet setup and your role.

Action	Location	Description
Rank Workers	Actions menu	Clear all of the rankings for the entire worksheet. The action first saves any changes

ORACLE

Action	Location	Description
		that you made to the worksheet so it doesn't lose them when it clears all ranking.
Reassign Workers to Another Manager	Actions menu	Reassign the selected people to another manager's worksheet so that the assigned manager can allocate their compensation. For example, you have someone who recently joined your team from another organization. You want their previous manager to make suggestions for this compensation cycle. That manager's submitted plan changes include the reassigned people. They disappear from your plan.
Manage Delegations	Actions menu	Temporarily grant another manager access to someone who doesn't report to them or fall within their reporting hierarchy. For example, delegate someone who works for you in a different location, to another manager who also works at that location. The delegated person remains in your plan and the other manager can suggest, but can't submit allocations. • The other manager can't see your plan tasks, such as approval and communication tasks. Nor can they see any reassignments or eligibility changes for the person you delegate to them. And that manager can't include the delegated person in any exports to Excel, budgeting, modeling, or reporting. • You can see the other manager's suggestions and you make the final allocations and submit the delegated person on your worksheet. You can also use delegation to create a separate worksheet to manage a distinct set of your own workers.
Request Eligibility Change	Actions menu	Submit a request to change the eligibility status of the selected people from eligible to ineligible or ineligible to eligible. The request can apply to all components linked to the workforce compensation plan. Or you can request to the change to apply to specific components.
Compare Salary History	Actions menu	Compare salary history for the selected people, such as their cumulative and average growth rates over 5 and 10 years. Cumulative growth shows the total percentage change over the period. Average growth shows the total percentage change divided by the number of years in the period.
View Audit Trail	Actions menu	View any changes made for the person selected in the worksheet or the entire team and any related budget changes. Information includes the updated column and component, the original and new values, and the update time and date. It also includes the name of the person who made the update. You can also

Action	Location	Description
		export this data to a spreadsheet using the icon on the search results toolbar.
View Currency Conversion Rates	Actions menu	View the source currency and all of the currencies and conversion rates applied to amounts on the worksheet. Also see the effective date for the conversion rates.
Configure Workbook	Actions menu	Identify the columns where people can update the values. For example, they can update the merit amount and stock option shares granted, but not the merit or bonus percentages.
Models	Toolbar	Create, open, or apply a model to use to allocate compensation or promotions. These actions are covered in another chapter.
Proposed Job	Row	Propose a new job for the person.
Proposed Grade	Row	Propose a new grade for the person.

You can use the person's eligibility information to determine if they qualify for a promotion. You can use header analytics to compare the person you want to promote with the rest of the team. And you can use the analytics to evaluate how all of the proposed promotions look across your team before you submit your plan changes.

> **Note:** When you use the tree view on the worksheet, you won't see the simple export option if your team has more than 500 members. You also won't see the options to expand or collapse all.

Apply Targets

The **Apply Targets** action is on the toolbar of only compensation worksheets. You can use this action to apply the values in the selected target columns to corresponding compensation columns. You can apply these targets for the selected people, your direct reports, or your entire team. When you apply the targets, you permanently override any existing compensation values. You can't undo the override.

Related Topics
- Types of Task Worksheets
- Header Information for Task Worksheets
- Overview of Workforce Compensation Models
- Create a Workforce Compensation Model

Delegate Workers

Before you delegate a worker to another manager, you need to configure the compensation plan to enable the Manage Delegations action. Here's how you enable that action:

1. Click **Navigator > My Client Groups > Compensation**.

ORACLE

2. Click **Workforce Compensation Plans** in the Compensation work area and select a compensation plan.

3. Click **Worksheet Display** task from the Configure Worksheets section.

4. Click **Configure Task Layout** for the task you want to enable the delegations for.

5. In the Actions tab, enable the **Manage Delegations** action.

6. Expand the Manage Delegations action and enable **Delegate Workers** and **Remove Delegations** actions.

7. Click **Save and Close**.

8. After you configure the compensation plan for delegations, the manager can delegate workers. Click **Workforce Compensation** in the My Team tab.

9. Select the task that you enabled delegations for.

10. Select the worker who you want to delegate to another manager.

11. Click **Actions > Manage Delegations > Delegate Workers**. You can remove any previous delegation you made by selecting the **Remove Delegations** option instead.

12. Select the manager you want to delegate the worker to in the **Review Manager** field.

13. Click **Submit**.

Performance Worksheet Actions

You can set overall performance ratings, such as meets expectations or exceeds expectations, and rankings for the people listed on performance worksheets. You can change the people using the team switcher on the toolbar.

For example, you're a manager and you change the set of people from your direct reports to the people two levels down. You can also search for specific people by name. You can apply either or both actions depending on the worksheet setup and your role.

> **Note:** When you use the tree view on the worksheet, you won't see the simple export option if your team has more than 500 members. You also won't see the options to expand or collapse all.

Related Topics
- Types of Task Worksheets
- Header Information for Task Worksheets

Approval Worksheet Actions

Here's a comprehensive list of the approval worksheet actions. They apply to all of your subordinate managers, direct reports and otherwise. You can apply some or all of them depending on the worksheet setup and your role.

Action	Location	Description
Approve	Actions menu and toolbar	Approve the proposed budget, compensation, performance, and promotion changes for the selected managers or all of your subordinate managers. After you approve their submitted

ORACLE

Action	Location	Description
		plan changes, your subordinate managers can't make any more changes to the plan worksheets.
Return for Correction	Actions menu and toolbar	Return the plan changes from the selected managers or all of your subordinate managers. Include comments about the corrections they need to make because these comments are automatically used to notify them.
Request Information	Actions menu and toolbar	Enter your request for the information that you can't find in the configured tabs at the top of the worksheet. The selected managers are automatically notified of your request.
Change Access for All Managers	Actions menu	Set the access level, such as no access, no updates allowed, or updates allowed, for all of your subordinate managers.
Access Level	Worksheet row	Set the access level, such as no access, no updates allowed, or updates allowed, for that row of the worksheet.
Change Due Date for All Managers	Actions menu	Change the due date for all of your subordinate managers, direct and otherwise.

For context about the workforce compensation plan changes awaiting your approval, use the configured tabs about compensation overview, allocation statistics, salary range analysis, and alerts. These tabs are at the top of the approval worksheet. You can also use icons in each row of the worksheet to see the manager's team status and action history.

Related Topics

- Types of Task Worksheets
- Header Information for Task Worksheets

Communication Worksheet Actions

Let your people know about changes to their compensation allocations, to performance ratings, and of promotions done as part of a workforce compensation cycle. You communicate the changes with compensation change statements.

How you generate and distribute the statements depends on the setup for the worksheet delivery option.

Manage and Store Centrally

You can generate an individual compensation change statement for each of your people. And your people can access the centrally stored statements from their compensation page unless the statements were made visible to only administrators and managers during processing. Again depending on the process configuration, you can view and print the statements. And you can release the statements to your people before they can otherwise access the statements themselves.

Compensation administrators run the **Workforce Compensation Change Statement** process to generate and store these statements. They run the process according to organizational policies, such as at the end of the workforce compensation cycle, when all changes are finished and approved.

Managers Generate and Deliver

You can generate statements at the same time for specific people, all of your direct reports, or in your management hierarchy. When you use the management hierarchy option, you can also generate statements for your people in a specified country. The process generates the statements in a single file. If the file contains multiple statements, you need to split the file into separate statements. Then you can give each statement to the appropriate individual. Your people see only the statements that you give to them, as long as they keep the statements. If you need change statements for your manager hierarchy, a subordinate's hierarchy, or a country, you need to work with your compensation administrator. Managers can select up to ten people and have statement criteria apply when they generate statements from the worksheet.

You can generate these change statements as appropriate, after the changes are transferred to HR, or if they received final approval.

Related Topics
- Types of Task Worksheets
- Header Information for Task Worksheets

ORACLE

9 Automatic Ranking in Workforce Compensation

Ways to Automatically Rank People

If you're ranking more than just your direct reports, you can automatically rank people from highest to lowest by their ranking score or percentile. Or, you can copy their direct managers' rankings.

Regardless of which method you select, the results could have multiple people with the same rank. When this happens, you can specify whether to retain the ties or arbitrarily resolve ties. How you handle ties can change the ranking results for any of the automatic ranking methods.

Related Topics
- How the Ranking Score Is Calculated

Automatically Rank People by Their Ranking Score

The ranking score considers all of the rankings from your subordinate managers. A person's ranking score varies depending on which manager in their management hierarchy is viewing the score. The score also considers each manager's position in the hierarchy.

The rankings of higher-level managers have more weight because the ranking compares the person with a larger population. The higher the score, the higher the rank.

When automatic ranking results in ties, you can retain the ties or arbitrarily resolve them. Here's an example of what each tie-handling option does.

Person	Score	Retain Ties	Arbitrarily Resolve Ties
Maria	100	1	1
Rahul	92	2	2
Maya	92	2	3
Janice	92	2	4
Carlos	32	3	5
Michael	32	3	6
Yan	18	4	7

ORACLE

Related Topics

- How the Ranking Score Is Calculated
- Budget Worksheet Actions
- Compensation and Promotion Worksheet Actions
- Performance Worksheet Actions

Automatically Rank People by Their Ranking Percentile

The ranking percentile considers the ranking given by a person's direct manager when ranking at least 10 workers. It ranks people in order from highest to lowest within a range of 0 to 100.

Here's the calculation used to determine the ranking: 100 - (rank / population * 100) = percentile.

The population is the total number of people ranked by the direct manager. For example, if a direct manager ranks someone 5 out of the 27 total people they ranked, the percentile is 82 according to this calculation: 100 - (5 / 27 * 100) = 82%.

When automatic ranking results in ties, you can retain the ties or arbitrarily resolve them. Here's an example of what each tie-handling option does.

Person	Percentile	Retain Ties	Arbitrarily Resolve Ties
Maria	95	1	1
Rahul	92	2	2
Maya	82	3	3
Janice	82	3	4
Carlos	64	4	5
Michael	50	5	6
Yan	47	6	7

Related Topics

- How the Ranking Score Is Calculated
- Budget Worksheet Actions
- Compensation and Promotion Worksheet Actions
- Performance Worksheet Actions

Automatically Rank People by Copying Their Direct Managers' Rankings

The ranking score uses rankings given by each person's direct manager exactly as given. The exception is reassigned people. For them, the ranking score considers their direct managers to be the managers they were reassigned to and uses those rankings.

Tip: Ranking values don't have to be consecutive. You can leave gaps in ranking, as appropriate.

When automatic ranking results in ties, you can retain the ties or arbitrarily resolve them. Here's an example of what each tie-handling option does.

Direct Manager	Person	Direct Manager's Ranking	Copied Ranking	Retain Ties	Arbitrarily Resolve Ties
Lakshmi	Maria	1	1	1	1
Lakshmi	Rahul	2	2	2	3
Lakshmi	Maya	3	3	3	4
Lakshmi	Janice	4	4	4	6
Barry	Carlos	5	5	5	8
Barry	Michael	3	3	3	5
Barry	Yan	2	2	2	2
Barry	Prasad	4	4	4	7

Related Topics
- How the Ranking Score Is Calculated
- Budget Worksheet Actions
- Compensation and Promotion Worksheet Actions
- Performance Worksheet Actions

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.

ORACLE

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 x [SUM(Group Population - Ranking + 1)] / SUM(Group Population)
```

The following table describes the variables in the equation:

Equation Variable	Description
Group Population	Includes all ranked workers reporting directly or indirectly to the manager viewing the score. The group population must include at least 10 workers for <name of application or process> to calculate a score.
Ranking	The position value given to a worker; it must be a positive, whole number from 1 to N.
1	Added to the numerator to ensure that workers ranked 1 by all managers receive a score of 100.
(Group Population - Ranking + 1)	Summed for the manager looking at the score and all lower managers who ranked the worker.

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.

Manager	Worker's Ranking	Workers Ranked	Group Population - Ranking + 1
John	299	2200	1902
Susan	75	600	526
Henry	15	90	76
Nancy	4	26	23
Peter	1	7	7
Sum	NA	2923	2534

The ranking score of the worker John views is 86.

ORACLE

Calculation: (100 * 2534) / 2923.

Example 2

Nancy views the same worker as John, in example 1.

Manager	Worker's Ranking	Workers Ranked	Group Population - Ranking + 1
Nancy	4	26	23
Peter	1	7	7
Sum	not applicable	33	30

The ranking score of the worker Nancy views changes to 91.

Calculation: (100*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.

Manager	Worker's Ranking	Workers Ranked	Group Population - Ranking + 1
Nancy	4	10	7
Peter	1	7	7
Sum	NA	17	14

The ranking score of that worker Nancy views is now 82.

Calculation: (100*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.

Related Topics

ORACLE

10 Compensation Manager Reports

Cycle Overview Reports for Workforce Compensation Managers

Here's a list of reports that show info about the workforce compensation cycle. The reports you see depend on what's enabled during plan setup.

Cycle Overview Reports

Report	How to Use
Allocation Statistics	See a statistical analysis of allocation amounts. Review the total amount of all allocations, the average, median, low, high, and standard deviation based on all workers who received allocations. The detailed table includes the same columns. Click the number of workers to see the Worker Details dialog. It includes the same details that you see in the Workers Compensated report.
Workers Compensated	Analyze the percentage of workers who are eligible and were allocated compensation, workers who are eligible and weren't allocated compensation, and workers who are not eligible to receive compensation. The detailed analysis includes the number and percentage of workers compensated, not compensated, and not eligible.
Worker Count by Allocation	See the number and percentage of workers who received allocations by the percentage of eligible salary that their allocation represents. You can select the number of increments to analyze. Based on the number of increments you select, the rows in the summary table as well as the columns in the detailed analysis include the number of workers who fall within these ranges.
Promotion Overview	Analyze job changes and promotions made within workforce compensation by Job Change, Position Change, Grade Change, Any Change, and No Change and the number of workers with each of these types of changes. For each of these types of changes, you can view the current and proposed values and the number of workers affected. You can select the data to view on the detail table to see details by Job Change, Position Change, Grade Change, Change Reason, or Change Date.
Manager Status	See a summary of where line managers are in the compensation process by the statuses displayed on the Compensation Plans Overview page. The possible statuses are: No Activity, Budget Available, Work in Progress, Submitted, In Approvals, Approved, and Processed. Click the number of managers in each status to see the Details tab of the report and view all the managers in that status.
Discrimination Detection	Analyze classes of people who are protected from pay discrimination. Possible statues are: Age, Disability, Gender, Nationality, and Race. You can filter the report by Discrimination Reporting Code, Ratings, Country, Job, Position, Location and Years in Job or at Company. Click Details to see the workers analyzed.

ORACLE

Pay for Performance Reports for Workforce Compensation Managers

Here's a list of reports that show how pay relates to performance. The reports you see depend on what's enabled during plan setup.

Pay for Performance Reports

Report	How to Use
Compensation Versus Rating Distribution	See how many workers have a performance rating and what percentage of the population these workers comprise, and the percentage of the total allocation this group holds. The summary table and detailed report includes the percentage of the population and percentage of compensation for each performance rating used. Click the number of workers to open the Worker Details dialog and see details for all workers who make up that total.
Average Allocation	See the average percentage of eligible salary awarded to workers based on their performance rating. The summary table and detailed report includes the average percentage of eligible salary for each performance rating used. Click the number of workers to open the Worker Details dialog and see details for all workers who make up that total.
Compa-Ratio by Performance Rating	See the average compa-ratio for workers before the current allocation and after the current allocation based on their performance rating. The summary table and detailed report includes the average before and after compa-ratio for each performance rating used. Click the number of workers to open the Worker Details dialog and see the details for all workers who make up that total.
Compensation by Rating	See the number of workers allocated and not allocated compensation by performance rating. The summary table and detailed report includes the number of workers compensated and not compensated for each performance rating used. Click the number of workers to open the Worker Details dialog and see the details for all workers who make up that total.

Salary Analysis Reports for Workforce Compensation Managers

Here's a list of reports that analyze salary. The reports you see depend on what's enabled during plan setup.

ORACLE

Salary Analysis Reports

Reports	How to Use
Salary Averages	Analyze salary before and after allocation. Compare the number of workers, average salary, median salary, low salary, high salary, and standard deviation. You can choose the type of salary used in the report. Choices are Actual Salary, Full-Time Equivalent, and Annualized Salary. The detailed table shows the before and after values for the average, median, low, and high annual salary, and the standard deviation. Click the number of workers to open the Worker Details dialog and see details for all workers who make up that total.
Salary Totals	Analyze total salaries before and after the allocation. The summary table shows the number of workers who received an allocation, prior total salary amount, total amount of increases, total amount of decreases, new total salary amount, and percentage change. The detailed table shows the same columns for annual salary. Click the number of workers to open the Worker Details dialog and see the same details displayed in the Salary Analysis report.
Compa-Ratio Averages	Analyze compa-ratio based on worker salaries before allocation and after allocation. The detailed table shows the before and after values for the average, median, low, high, and standard deviation. Click the number of workers to open the Worker Details dialog and see details for all workers who make up that total.
Allocation by Salary Range	See what the median allocation is based on the following measures: • Compa-ratio in 5% increments • Compa-ratio in 10% increments • Quartiles • Quintiles • Deciles You can select which of the 5 measures to use to render the report. You can also select the type of average you want to see in the report: median percent, median amount, mean percent, or mean amount. Click the number of workers to open the Worker Details dialog and see the same columns as the Salary Range Distribution report
Salary Range Distribution	See what the median allocation is before and after allocation based on the following measures: • Compa-ratio in 5% increments • Compa-ratio in 10% increments • Quartiles • Quintiles • Deciles You can select which of the 5 measures to use to render the report. You can also select the type of average you want to see in the report: median percent, median amount, mean percent, or mean amount. Click the number of workers to open the Worker Details dialog and see details for all workers who make up the total.

ORACLE

Target Analysis Reports for Workforce Compensation Managers

Here's a list of reports that analyzes compensation targets. The reports you see depend on what's enabled during plan setup.

Target Analysis Reports

Report	How to Use
Workers on Target	See a summary of worker allocations as they relate to targets. The detailed analysis includes the following columns: • Total Workers • On Target • Above Target • Below Target • No Target • Not allocated compensation Click the number of workers to open the Worker Details dialog and see details for all workers who make up that total.
Actual Versus Target	See the actual compensation allocated versus configured target amounts. The detailed analysis includes the following columns: • Total Workers • Total Actual Compensation • Total Targeted Compensation • Amount Difference • Percentage Difference Click the number of workers to open the Worker Details dialog and see details for all workers who make up that total.
Deviation from Target	See the number of workers whose allocation deviates from target. You can select the number of increments to analyze. The summary chart and table as well as the columns in the detailed analysis shows the number of workers on target, as well as those within 5 increments on either side of the target. Click the number of workers to open the Worker Details dialog and see details for all workers who make up that total.

ORACLE

Distribution Analysis: Allocations by Manager Report for Workforce Compensation Managers

See the percentage of workers compensated by manager and the average percentage and amount allocated.

You see this report only if it's enabled during plan setup.

ORACLE

11 Workforce Compensation Models

Overview of Workforce Compensation Models

Building compensation models can help you align your budgets and compensation allocations with organizational pay practices and guidelines.

You can determine manager budgets based on criteria, such as performance ratings or current compa-ratios of eligible people in their organizations. You can also automatically allocate compensation amounts according to each person's country, job, grade, and quartile.

You can create, update, and apply models to any workforce compensation plans set up to include models. The Models page list any models you created. It also lists any global models that compensation managers created and made available for you to use. These global models let you allocate budget, target amounts, or compensation amounts for your enter plan population.

You work with models using the **Models** task on the landing page of the workforce compensation plan or the **Models** actions on worksheet toolbars. You create global models using the **Global Models** task in the Compensation work area.

Related Topics

- Types of Task Worksheets
- Budget Worksheet Actions
- Compensation and Promotion Worksheet Actions
- Performance Worksheet Actions

Allocation Methods in Workforce Compensation Models

Use models to calculate budget or compensation amounts and target amounts or ranges for a group of people. The allocation method used determines the values you can enter in the model and how the model calculates and applies the results.

The available allocation methods depend on the setup of the workforce compensation plan. Here's a comprehensive list of the allocation methods:

Model Allocation Method	Examples
Bring people up to a specific compa-ratio or quartile	Bring your people in the US whose compa-ratio is less than 80 to a compa-ratio of 100. Bring your people in the UK Operations department to the third quartile.
Supply a numeric or text value to a user-defined column	Rename user-defined numeric column **16** to **Corporate Modifier**. For your people with a target of 80% or more who are in the US display **02**. For those in Canada, display **05**. Rename user-defined text column **1** to **Sanity Check**. For your people whose performance rating is high and compa-ratio is less than 90, display **Verify Salary**.

ORACLE

Model Allocation Method	Examples
Supply a target range or percentage	Give a target bonus range of **3,000** to **5,000 USD** to everyone in the US whose job title is **Analyst** and grade is **3**.
Allocate the budget or compensation by a specified amount or percentage	Allocate a bonus of **5,000 GBP** to your people in the UK who have an outstanding performance rating. Allocate a bonus of **2,500 USD** to your people in the US who have an average performance rating.
Increase the budget or compensation by a specified amount or percentage	Give everyone in France an additional 1% of eligible salary on top of their allocated compensation. **Tip:** To decrease a budget, enter a negative number or percentage.

Create a Workforce Compensation Model

Here's how you create a workforce compensation model.

▶ **Watch video**

Use the **Models** task on the landing page of the workforce compensation plan or the **Models** > **Create Model** action on a task worksheet. To create global models, use **My Client Groups** > **Compensation** > **Global Models**.

1. Enter the general information for the model, including a descriptive name and applicable workforce compensation component. For example, **2021 Performance and Merit Increases**.
2. Define the model by selecting the allocation method and optionally selecting the model access. You need to select at least one grouping criteria for the results, but no more than four. For example, allocate n percent of eligible salary, share the results with all of your managers, and group the results by job and performance rating.
3. Specify the people to include and exclude from the model using the **Show** field and **Include Workers Shown** and **Exclude Workers Shown** buttons. You can use the **Include** table column to handle exceptions within the current list of people. By default, the model includes all of your people who are eligible for the component. You can show and include, for example, only subordinate managers. Then, to exclude certain managers in the current list, you clear their **Include** option. If a person you're excluding has subordinates, you can also exclude them at the same time.
4. Enter the values you want to model. For example, to model increases for analysts according to their performance, enter these **Percentage of Eligible Salary** values:
    - In the **Analyst, 3 - Meets Expectations** row, enter **3**.
    - In the **Analyst, 4 - Exceeds Expectations** row, enter **4**.
    - In the **Analyst, 5 - Outstanding** row, enter **5**.
5. Select the purpose of the model.

Model Purpose	Description
Determine Budget Amounts	Use the model rollup amounts as the basis for each subordinate manager's overall budget.

ORACLE

Model Purpose	Description
Determine Compensation Amounts	Use model results as the values in the specified compensation column of the worksheet, such as **Merit Amount**.
Determine Target Amounts	Use model results as target amounts.

6. Review the model results. You can specify whether to show results for only your subordinate managers who report directly to you, or for all of your subordinate managers. You can also display the results as details by individual or rolled up by manager.

   The amounts you see don't have any rounding rules applied because the model can apply results as budget, compensation, or target amounts. These different amounts can have different rounding rules set up and there's no way for the model to know which rule to apply.

7. Specify how to apply the model results, such as replace managers' existing budget values or add to them. Then save and apply the model results.

8. View the resulting budget, return to the model, or return to the plan page or worksheet.

ORACLE

ORACLE