

# Oracle Fusion Cloud Human Resources

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## **Implementing Compensation**

24B



Oracle Fusion Cloud Human Resources  
Implementing Compensation

24B

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# Get Help

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Thanks for helping us improve our user assistance!



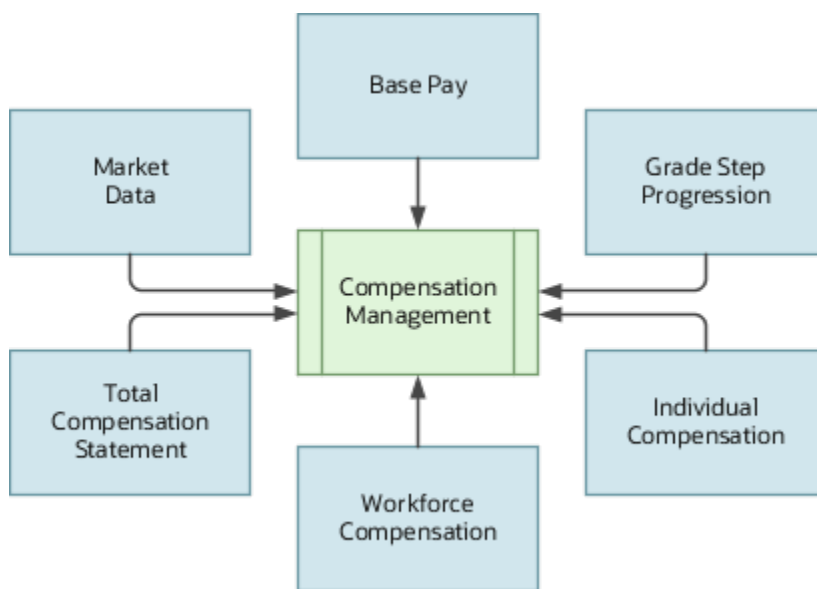


# 1 Overview of Compensation

## Overview of Compensation Setup

You can plan and allocate salary and compensation for individuals and your workforce. You can also communicate compensation information to individuals.

To get started implementing compensation, you need to have the Application Implementation Consultant role. With that role, you can opt into the Compensation Management offering in the Setup and Maintenance work area. You can also enable the relevant functional areas for your business.



Functional Area	Description
Base Pay	Collect and store salary information and pass it to payroll for processing. Also set up salary ranges and metrics to help managers and HR specialists follow organizational policies when proposing and approving salary changes. For example, a manager reviewing salary information for a promotion sees that the salary is just below the midpoint of the person's grade rate. The person is a high performer, so the manager decides to increase the salary change to be above the midpoint.
Grade Step Progression	Automate people's progression through grade ladders according to eligibility criteria and rules that reflect your progression policies. Also propose a new salary amount for the progression, or even automatically update the salary amount. For example, automatically promote someone to the next step of a progression grade ladder after 1 year when their performance rates 4 or higher.
Individual Compensation	Design compensation plans that let managers and HR specialists allocate off-cycle compensation to individuals, such as bonuses, tuition reimbursement, or allowances. Also design plans that let individuals contribute to charities or savings plans. And, identify the compensation awards that individuals can see in their compensation history.
Workforce Compensation	Create compensation plans and cycles used for compensating a group of workers. Configure the type of compensation allocated, the information displayed to managers, and whether to use budgeting. Also configure eligibility criteria for the plan or component, and the approval hierarchy.

Functional Area	Description
Total Compensation Statements	Design and deliver statements for individuals that can include traditional forms of pay, such as salary and individual compensation awards. You can also include nontraditional forms of pay, such as fringe benefits, cost of benefits, and paid time off.
Market Data	Analyze compensation survey data, survey jobs, survey job structures, and other survey attributes. Survey data can include key metrics, such as percentiles and deciles.

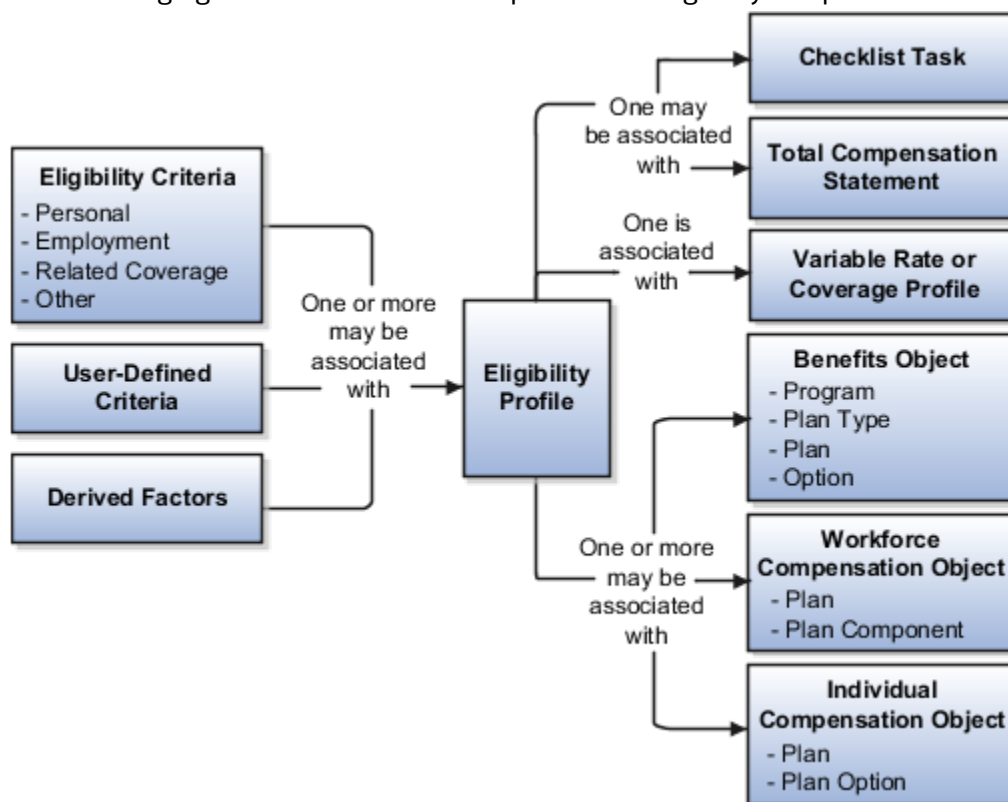
#### Related Topics

- [Plan Your Implementation](#)

## 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.

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

### Related Topics

- [Eligibility Profiles](#)
- [User-Defined Criteria](#)
- [Derived Factors](#)

## 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:

Setting	Description
Profile Type	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.

Setting	Description
Usage	<p>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.</p> <p>Selecting <b>Global</b> makes the profile available to multiple business process usages.</p>
Assignment to Use	<p>Determines the assignment that the eligibility process evaluates for the person</p> <ul style="list-style-type: none"> <li>• Select <b>Specific assignment</b> when the usage is Compensation or Performance.</li> <li>• Select a value that includes <b>benefit relationship</b> 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.</li> <li>• Select one of the following values for all other usages, such as total compensation statements: <ul style="list-style-type: none"> <li>○ Any assignment - enterprise</li> <li>○ Employee assignment only - enterprise</li> <li>○ Primary employee assignment only - enterprise</li> </ul> </li> </ul>

## Defining Eligibility Criteria

Here's the list of eligibility criteria that you can use to configure benefit offerings:

Category	Description
Personal	<ul style="list-style-type: none"> <li>• Gender</li> <li>• Person Type</li> <li>• Disabled</li> <li>• Uses Tobacco</li> <li>• Service Areas</li> <li>• Home Location</li> <li>• Postal Code Ranges</li> <li>• Leave of Absence</li> <li>• Termination Reason</li> <li>• Qualification</li> <li>• Competency</li> <li>• Marital Status</li> <li>• Religion</li> </ul>
Employment	<ul style="list-style-type: none"> <li>• Assignment Status</li> <li>• Hourly or Salaried</li> <li>• Assignment Category</li> </ul>

Category	Description
	<ul style="list-style-type: none"> <li>• Grade</li> <li>• Job</li> <li>• Position</li> <li>• Payroll</li> <li>• Salary Basis</li> <li>• Department</li> <li>• Legal Entities</li> <li>• Performance Rating</li> <li>• Quartile in Range</li> <li>• Work Location</li> <li>• Range of Scheduled Hours</li> <li>• People Manager</li> <li>• Job Function</li> <li>• Job Family</li> <li>• Hire Date</li> <li>• Probation Period</li> <li>• Business Unit</li> </ul>
Derived factors	<ul style="list-style-type: none"> <li>• Age</li> <li>• Length of Service</li> <li>• Compensation</li> <li>• Hours Worked</li> <li>• Full-Time Equivalent</li> <li>• Combined Age and Length of Service</li> <li>• Benefit Groups</li> <li>• Health Coverage Selected</li> <li>• Participation in Another Plan</li> <li>• Formula</li> <li>• User-Defined Criteria</li> </ul>
Other	<ul style="list-style-type: none"> <li>• Benefit Groups</li> <li>• Health Coverage Selected</li> <li>• Participation in Another Plan</li> <li>• Formula</li> <li>• User-Defined Criteria</li> </ul>
Related coverage	<ul style="list-style-type: none"> <li>• Covered by Another Plan</li> <li>• Covered by Another Plan in Program</li> <li>• Covered by Another Plan Type in Program</li> <li>• Covered by Another Program</li> </ul>

Category	Description
	<ul style="list-style-type: none"><li>• Dependent Eligible for Another Plan Type in Program</li><li>• Eligible for Another Plan</li><li>• Eligible for Another Plan Type in Program</li><li>• Enrolled in Another Option in Plan</li><li>• Enrolled in Another Plan</li><li>• Enrolled in Another Plan in Program</li><li>• Enrolled in Another Plan Type in Program</li><li>• Enrolled in Another Program</li><li>• Other Coverage</li></ul>
Labor Relations	<ul style="list-style-type: none"><li>• Bargaining Unit</li><li>• Labor Union Member</li><li>• Union</li><li>• Collective Agreement</li></ul>

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*

- [Create a Participant Eligibility Profile](#)
- [Examples of Eligibility Profiles](#)
- [Derived Factors](#)
- [User-Defined Criteria](#)
- [Single or Multiple Eligibility Profiles](#)



# 2 Setup and Maintenance Tasks

## Base Pay Setup and Maintenance Tasks

You can calculate, adjust, and maintain salary and hourly earnings for your people by completing these setup tasks in the sequence listed.

Task Name	Description	Recommended Help
Elements	Create legislative data group (LDG) payroll elements to use when you configure salary bases. For example, create recurring standard earnings to handle annual salaries and hourly earnings.	<ul style="list-style-type: none"> <li><a href="#">Create a Payroll Element to Use with Salary Bases</a></li> <li><a href="#">Troubleshoot Salary-Related Issues</a></li> </ul>
Grades	Create grades that record people's level of compensation. And define one or more grades that apply for jobs and positions. You use the grade rates for grades to validate salary proposals.	<ul style="list-style-type: none"> <li><a href="#">Grades</a></li> <li><a href="#">How Grades, Grade Rates, and Sets Work with Legislative Data Groups</a></li> </ul>
Grade Rates	Create grade rates to hold the pay values related to each grade. Grade rates linked to salary bases typically serve as guidelines to validate that proposed salary is appropriate for that grade.	<ul style="list-style-type: none"> <li><a href="#">Grade Rates</a></li> <li><a href="#">How Grades, Grade Rates, and Sets Work with Legislative Data Groups</a></li> </ul>
Progression Grade Ladder	Optionally create progression grade ladders to automatically move people from one grade, or grade and step, to the next level in a grade ladder. For example, you want to automatically move new hires to the next step after their first 6 months on the job.	<ul style="list-style-type: none"> <li><a href="#">Grade Step Progression Setup and Maintenance Tasks</a></li> <li><a href="#">How You Validate Salary Changes with the Grade Range</a></li> <li><a href="#">Troubleshoot Salary-Related Issues</a></li> </ul>
Compensation Zones	Optionally create compensation zone and zone types to use in salary range differentials that adjust base ranges by compensation or wage regions. For example, you want to pay everyone working on the East Coast of the US at 1.1 times the standard grade rate. You want to pay everyone working on the West Coast at 1.2 times. You pay Central people the standard grade rate and everyone in the South at 0.8 times.	<ul style="list-style-type: none"> <li><a href="#">Overview of Salary Range Differentials</a></li> <li><a href="#">Configure Compensation Zone Types and Zones</a></li> </ul>
Salary Range Differentials	Optionally create salary range differentials to adjust base salary ranges from the grade rate associated with the salary basis. Differentials vary, for example, to reflect the cost of living in different locations or the relative ease of hiring. You use these differentials when configuring salary bases.	<ul style="list-style-type: none"> <li><a href="#">Overview of Salary Range Differentials</a></li> <li><a href="#">Configure Salary Range Differentials</a></li> <li><a href="#">How You Validate Salary Changes with the Grade Range</a></li> </ul>
Configure Actions	Optionally add actions to identify the cause when creating or changing salary. For example,	<a href="#">Action Framework</a>

Task Name	Description	Recommended Help
	track that salary changed as part of a promotion or transfer.	
Action Reasons	Optionally add reasons to associate with actions, mostly for reporting and analysis. For example, when a manager changes someone's salary as part of a transfer, have them indicate whether it's because of cost of living.	<a href="#">Action Framework</a>
Manage Common Lookups	Optionally change or add components to the CMP_SALARY_COMPONENTS and ORA_CMP_SIMPLE_SALARY_COMPS lookup types to better support your reporting policies for salary allocations. You use the incremental or simple salary components when configuring salary bases that let HR specialists and managers itemize new or adjusted salary. The itemizations reflect the different reasons for their allocations.	<ul style="list-style-type: none"> <li><a href="#">Incremental Salary Component Lookups</a></li> <li><a href="#">Simple Salary Component Lookups</a></li> </ul>
Salary Basis	Create salary bases that get used when creating salary and help with processing. For example, salary basis settings get used to decide salary amounts, currency, frequency, and metrics. And the payroll element linked to the salary basis holds the salary amount, which gets passed to payroll for processing.	<ul style="list-style-type: none"> <li><a href="#">Overview of Base Pay Configuration</a></li> <li><a href="#">How Many Salary Bases to Create</a></li> <li><a href="#">Salary Basis Options for Determining Salary Amount</a></li> <li><a href="#">Considerations for Using Salary Bases with Incremental Components versus Simple Components</a></li> </ul>
Manage Task Configurations for Human Capital Management	Optionally change default approval workflows to support your salary change policies. For example, automatically approve salary changes proposed by HR specialists. Route approvals based on country and amount. And specify the levels of approval using grades.	<ul style="list-style-type: none"> <li><a href="#">How Default Approval Tasks for Salary and Individual Compensation Work</a></li> <li><a href="#">Troubleshoot Salary-Related Issues</a></li> </ul>
Manage Profile Options	Enable the applicable salary actions controlled by profile options. For example, let people use HCM Data Loader to load salary changes when related salary is pending approval. Prevent people who don't have access to the source assignment salary from proposing salary during global transfers. And copy future salary changes during local and global transfers. Also, if you're going to use autocomplete rules with salary objects, you need to expose the Autocomplete Rules feature.	<ul style="list-style-type: none"> <li><a href="#">CMP_COMPENSATION_RESPONSIVE_ENABLED Profile Option</a></li> <li><a href="#">ORA_CMP_LGT_WHEN_MISSING_SALARY_DATASEC Profile Option</a></li> <li><a href="#">BIP_ONLINE_NOTIFICATION_HCM_COMPENSATION Profile Option</a></li> <li><a href="#">Get Started with Autocomplete Rules</a></li> <li><a href="#">Overview of Profile Options</a></li> <li><a href="#">Create and Edit Profile Options</a></li> </ul>
Sandboxes	Enable a sandbox to access the HCM Experience Design Studio and Autocomplete Rules for the Salary object. You can either manually create and enable a sandbox or automatically create it.	<ul style="list-style-type: none"> <li><a href="#">How You Enable Access to Autocomplete Rules</a></li> <li><a href="#">Overview of Salary</a></li> <li><a href="#">Delivered Rules for Salary</a></li> <li><a href="#">General Considerations for Salary</a></li> <li><a href="#">Prepare to Move Salary Rules to Production Environments</a></li> </ul>

## Security Reference

The tasks that people can do and the data that they can see depend on their roles, duties, and privileges. For information about these factors, see these two guides:

- [Securing HCM](#)
- [Security Reference for HCM](#)

## Individual Compensation Setup and Maintenance Tasks

You can let people award compensation outside of the regular compensation cycle and manage personal contributions. To do this, complete these setup tasks in the sequence listed.

Task Name	Description	Recommended Help
Elements	Create legislative data group (LDG) payroll elements to use when you configure individual compensation plans. For example, create recurring standard earnings to handle vehicle or gym allowances. Create information elements to handle stock grants and to store nonmonetary information, such as durations or points. Create recurring voluntary deductions to handle savings plans and charitable contributions. And create nonrecurring voluntary deductions to handle onetime charitable contributions.	<ul style="list-style-type: none"><li>• <a href="#">Create a Payroll Element to Use with Individual Compensation Plans</a></li></ul>
Configure Actions	Optionally add HR actions that specify access to individual compensation plans. For example, you can add the Transfer action to a moving allowance plan to make the plan available when people transfer someone using that action.	<ul style="list-style-type: none"><li>• <a href="#">Action Framework</a></li><li>• <a href="#">Plan Access Restrictions in an Individual Compensation Plan Configuration</a></li><li>• <a href="#">Plan Access Restrictions</a></li></ul>
Eligibility Profiles	Optionally create eligibility profiles to define criteria that decide whether a person qualifies for the linked individual compensation plan option. For example, identify appropriate vehicle allowance options based on people's job title and proximity to a specific office.	<ul style="list-style-type: none"><li>• <a href="#">How Eligibility Works With Other Objects</a></li><li>• <a href="#">Eligibility Profiles</a></li></ul>
Document Types	Optionally create document types to link with options for individual compensation plans. You can then request or require people proposing allocations for the options attach supporting documents. Approvers can use the documents when deciding to approve or reject the proposals. For example, set up a vehicle allowance option to require a vehicle details document.	<ul style="list-style-type: none"><li>• <a href="#">Document Type Settings for Individual Compensation</a></li><li>• <a href="#">Options in an Individual Compensation Plan Configuration</a></li></ul>
Individual Compensation Plans	Create the individual compensation plans that let managers and HR specialists award compensation outside of the regular compensation cycle. For example, let managers give spot bonuses or grant stock shares.	<ul style="list-style-type: none"><li>• <a href="#">Overview of Individual Compensation</a></li><li>• <a href="#">Plan Access Restrictions</a></li></ul>

Task Name	Description	Recommended Help
		<ul style="list-style-type: none"><li>• <a href="#">Spot Bonus and Stock Grant Plan Configuration</a></li><li>• <a href="#">Car Allowance Plan Configuration</a></li><li>• <a href="#">Charity or Savings Contribution Plan Configuration</a></li></ul>
Manage Task Configurations for Human Capital Management	Optionally change default approval workflows to support your individual compensation allocation policies. For example, automatically approve personal contributions. And route individual compensation and administer compensation allocations for approval.	<ul style="list-style-type: none"><li>• <a href="#">How Default Approval Tasks for Salary and Individual Compensation Work</a></li><li>• <a href="#">How You Configure Different Approval Flows for Individual Compensation Allocations and Personal Contributions</a></li></ul>
Manage Profile Options	Enable the applicable individual compensation actions controlled by profile options. For example, allow people to submit more personal contributions while other contributions are still pending approval. Enable only people with relevant security privileges maintain individual compensation in HR actions that have the section. And prevent people from submitting a Personal Contribution, an Individual Compensation, or an Administer Compensation action without making changes.	<ul style="list-style-type: none"><li>• <a href="#">BIP_ONLINE_NOTIFICATION_HCM_COMPENSATION Profile Option</a></li><li>• <a href="#">CMP_DISABLE_PENDING_APPROVALS_CHECK_IN_MA Profile Option</a></li><li>• <a href="#">ORA_CMP_BIP_IC_SHOW_INPUT_VALUES Profile Option</a></li><li>• <a href="#">Overview of Profile Options</a></li><li>• <a href="#">Create and Edit Profile Options</a></li></ul>
Map Third-Party Plans	Create maps between plans and plan components to transition third-party plans to individual compensation plans.	<ul style="list-style-type: none"><li>• None</li></ul>

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- [Security Reference for HCM](#)

## Grade Step Progression Setup and Maintenance Tasks

You can move people automatically from one grade, or grade and step, to the next level in a grade ladder using grade step progression. To do this, complete these setup tasks in the sequence listed.

Task Name	Description	Recommended Help
Manage Common Lookups	Optionally, create groups for progression grade ladders using the ORA_CMP_GSP_GRADE_LADDER_GRP lookup. You can associate progression grade ladders with a group. Then you can use the group of ladders instead of a single ladder when processing grade step progressions.	<ul style="list-style-type: none"><li>• <a href="#">Overview of Lookups</a></li><li>• <a href="#">Basic Process to Manage Grade Step Progression</a></li></ul>

Task Name	Description	Recommended Help
Progression Grade Ladder	Create progression grade ladders with the grades, or grades and steps, that people should progress through, and the rules for progression. For example, you create a grade ladder for manufacturing workers with the Job Assembly II grade. The grade has three steps. Progression rules move people with that grade from 1 step to the next, every 6 months.	<ul style="list-style-type: none"> <li><a href="#">Basic Process to Manage Grade Step Progression</a></li> <li><a href="#">Create a Progression Grade Ladder for Batch Processing</a></li> <li><a href="#">Overview of HCM Data Loader</a></li> <li><a href="#">Guidelines for Using HCM Spreadsheet Data Loader</a></li> <li><a href="#">Guidelines for Loading Progression Grade Ladders</a></li> <li><a href="#">Guidelines for Loading Progression Grade Rates</a></li> </ul>
Configure Global Settings (if the Redwood experience isn't enabled)  Grade Step Progression Settings (if the Redwood experience is enabled)	Review the default online and batch settings for grade step progression, and change as appropriate.	<ul style="list-style-type: none"> <li><a href="#">Global Compensation Settings for Defaulting Salary from Grade Ladder Rates</a></li> <li><a href="#">Batch Settings for Grade Step Progression Processing</a></li> <li><a href="#">Batch Error Conditions for Assignment Date in Grade Step Progression Processing</a></li> <li><a href="#">Batch Error Conditions for Salary Date in Grade Step Progression Processing</a></li> </ul>
Run Grade Step Progression	Schedule the Run Grade Step Progression process to identify the assignments eligible to progress to a new grade or step.	<ul style="list-style-type: none"> <li><a href="#">Overview of Grade Step Progression Processing</a></li> <li><a href="#">Run Grade Step Progression Process</a></li> </ul>
Synchronize Grade Step Rate	Run the Synchronize Grade Step Rate process according to your policies, to change people's salaries after the underlying rates for the grades or steps change.	<ul style="list-style-type: none"> <li><a href="#">Overview of Grade Step Progression Processing</a></li> <li><a href="#">Synchronize Grade Step Rate Process</a></li> </ul>

## Security Reference

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- [Security Reference for HCM](#)

## Workforce Compensation Setup and Maintenance Tasks

Complete these setup tasks to enable managers to award compensation within the regular compensation cycle.

## Workforce Compensation Setup and Maintenance Tasks

Task Name	Description	Recommended Help
Manage Workforce Compensation Lookups	Review and maintain lookup values for budget audit history, such as initial budget and budget distributed by manager.	<ul style="list-style-type: none"> <li><a href="#">Reason Lookups</a></li> <li><a href="#">Nonmonetary Unit of Measure Lookups</a></li> <li><a href="#">User-Defined Column Lookups</a></li> </ul>
Workforce Compensation Plans	Create and maintain compensation plans and associated budget details.	<ul style="list-style-type: none"> <li><a href="#">Overview of Workforce Compensation Plan Configuration</a></li> </ul>
Configure Compensation History	Specify the payroll elements and input values that make up a worker's compensation history.	<ul style="list-style-type: none"> <li><a href="#">Compensation History Categories</a></li> <li><a href="#">How You Set Up the Other Compensation and Recurring Payments Summary Data for Compensation History</a></li> </ul>
Configure Global Compensation Settings	Configure properties, such as stock price and watchlist availability, that apply to all group compensation plans.	<ul style="list-style-type: none"> <li><a href="#">General and Watchlist Global Settings for Workforce Compensation Plans</a></li> <li><a href="#">Global Setting Options for Workforce Compensation Plan Notifications</a></li> </ul>
Configure Compensation Batch Processes	Configure processing parameters, such as the maximum number of errors allowed, for each batch process.	<ul style="list-style-type: none"> <li><a href="#">Start Workforce Compensation Cycle and Synchronize Hierarchy Processes</a></li> <li><a href="#">Refresh Workforce Compensation Data Process</a></li> <li><a href="#">Transfer Workforce Compensation Data to HR Process</a></li> <li><a href="#">Back Out and Purge Workforce Compensation Data Processes</a></li> <li><a href="#">Process Workforce Compensation Change Statements Process</a></li> </ul>
Elements	Review predefined earnings and deduction elements and create new ones, using a questionnaire that automatically generates the related balances, formulas, and other components.	<ul style="list-style-type: none"> <li><a href="#">Define Elements, Balances, and Formulas</a></li> </ul>
Fast Formulas	Review predefined formulas and create new ones to validate or calculate data for benefits, human resources, absences, or payroll.	<ul style="list-style-type: none"> <li><a href="#">Define Elements, Balances, and Formulas</a></li> <li><a href="#">Overview of Using Formulas</a></li> </ul>
Derived Factors	Create and update application-calculated eligibility criteria that can change over time, such as participant age or length of service.	<ul style="list-style-type: none"> <li><a href="#">Derived Factors</a></li> </ul>
Manage Action Reasons	Review predefined action reasons that track changes to data, and create new ones.	<ul style="list-style-type: none"> <li><a href="#">Action Framework</a></li> </ul>
Profile Rating Models	Create and update models for rating the performance, potential, and proficiency level of workers.	<ul style="list-style-type: none"> <li><a href="#">Rating Models</a></li> </ul>

## Security Reference

The tasks that people can do and the data that they can see depend on their roles, duties, and privileges. For information about these factors, see these two guides:

- [Securing HCM](#)
- [Security Reference for HCM](#)

### Related Topics

- [Overview of Workforce Compensation](#)

# Total Compensation Statements Setup and Maintenance Tasks

Complete these setup tasks to enable people to define and generate a total compensation statement.

### **Total Compensation Statements Setup and Maintenance Tasks**

Task List	Task Name	Description	Recommended Help
Define Total Compensation Statements		Configure the design, content, and delivery of a compensation statement that includes nontraditional forms of pay. For example, you can include fringe benefits, cost of benefits, and paid time off, as well as base pay and variable compensation.	<ul style="list-style-type: none"><li>• <a href="#">Overview of Creating a Total Compensation Statement</a></li></ul>
	Compensation Items	Create the lowest level of detail displayed in total compensation statements originating from sources such as payroll balances or element entries.	<ul style="list-style-type: none"><li>• <a href="#">Compensation Items and Sources</a></li></ul>
	Compensation Categories	Create and configure categories to display similar types of compensation information in tabular format in compensation statements.	<ul style="list-style-type: none"><li>• <a href="#">Compensation Category Types</a></li><li>• <a href="#">Compensation Categories and Subcategories</a></li></ul>
	Statement Definitions	Create and configure statement definitions that determine the structure and period of the statement, the compensation displayed, and the graphs and information text that appear on the statement.	<ul style="list-style-type: none"><li>• <a href="#">Guidelines to Create Total Compensation Statement Definitions</a></li><li>• <a href="#">Best Practices for Planning Statement Definitions</a></li></ul>
	Configure Global Settings	Configure options, such as stock price and watchlist availability, that apply to all generated statements.	<ul style="list-style-type: none"><li>• <a href="#">Overview of Creating a Total Compensation Statement</a></li></ul>

Task List	Task Name	Description	Recommended Help
	Manage External Compensation Data Lookups	Manage lookup type used to identify and categorize data from a third-party application that you import for use in a compensation business process.	<ul style="list-style-type: none"> <li><a href="#">External Compensation Data</a></li> <li><a href="#">Record Type Lookups for External Compensation Data</a></li> </ul>
	Configure Compensation Batch Parameters	Configure processing parameters, such as the maximum number of errors allowed, for each batch process.	<ul style="list-style-type: none"> <li><a href="#">Overview of Creating a Total Compensation Statement</a></li> </ul>
Manage Payroll Objects		Create and configure payroll elements, such as earnings and deductions, as well as payroll balances and formulas used to manage compensation.	<ul style="list-style-type: none"> <li><a href="#">Compensation Items and Sources</a></li> </ul>
	Balance Definitions	Review the predefined balance definitions and create ones as needed, including specifying assigned dimensions and feeds.	<ul style="list-style-type: none"> <li><a href="#">Define Elements, Balances, and Formulas</a></li> </ul>
	Fast Formulas	Review predefined formulas and create new ones to validate or calculate data for benefits, human resources, absences, or payroll.	<ul style="list-style-type: none"> <li><a href="#">Define Elements, Balances, and Formulas</a></li> </ul>

## Security Reference

The tasks that people can do and the data that they can see depend on their roles, duties, and privileges. For information about these factors, see these two guides:

- [Securing HCM](#)
- [Security Reference for HCM](#)



## 3 Profile Options for Compensation Pages, Actions, and Approval Notifications

### CMP\_COMPENSATION\_RESPONSIVE\_ENABLED Profile Option

To let everyone use the responsive compensation pages that adjust to the screen size of their devices, use this option. It's enabled by default. For the enabled profile option to work, you also need to create and enable the HCM\_RESPONSIVE\_PAGES\_ENABLED profile option.

#### *Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

### BIP\_ONLINE\_NOTIFICATION\_HCM\_COMPENSATION Profile Option

To generate BI approval notifications for all compensation actions, such as Change Salary and Individual Compensation, create and enable this option. For the enabled profile option to work, you also need to create and enable the BIP\_ONLINE\_NOTIFICATION\_HCM profile option.

#### *Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

### BIP\_ONLINE\_DISCLOSE\_HISTORY\_HCM\_COMPENSATION Profile Options

To have the approval notification Approvers section include a Show Details link instead of listing submission and approval details, create and enable these options. You reduce the initial notification content while still letting people see the details when appropriate.

- BIP\_ONLINE\_DISCLOSE\_HISTORY\_HCM\_COMPENSATION\_CHANGESALARYAPPROVALTASK applies to notifications for the Change Salary and Administer Salary tasks.

- BIP\_ONLINE\_DISCLOSE\_HISTORY\_HCM\_COMPENSATION\_VARIABLEALLOCATIONTASK applies to notifications for the Manage Personal Contributions, Individual Compensation, and Administer Individual Compensation tasks.

For the preceding profiles to work after you enable them, you also need to create and enable these profile options:

- BIP\_ONLINE\_DISCLOSE\_HISTORY\_HCM
- BIP\_ONLINE\_DISCLOSE\_HISTORY\_HCM\_COMPENSATION

When you enable or disable these profile options, you affect all notifications generated after that change.

#### *Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

## BIP\_ONLINE\_HIDE\_EDIT\_HCM\_COMPENSATION Profile Options

To hide the Edit button on approval compensation notifications, create and enable these options.

- BIP\_ONLINE\_HIDE\_EDIT\_HCM\_COMPENSATION\_CHANGESALARYAPPROVALTASK applies to notifications for the Change Salary and Administer Salary tasks.
- BIP\_ONLINE\_HIDE\_EDIT\_HCM\_COMPENSATION\_VARIABLEALLOCATIONTASK applies to notifications for the Manage Personal Contributions, Individual Compensation, and Administer Individual Compensation tasks.

For the preceding profiles to work after you enable them, you also need to create and enable these profile options:

- BIP\_ONLINE\_HIDE\_EDIT\_HCM
- BIP\_ONLINE\_HIDE\_EDIT\_HCM\_COMPENSATION

When you enable or disable these profile options, you affect all notifications generated after that change.

#### *Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

## ORA\_PER\_EMPL\_ENABLE\_WRK\_ASG\_REST\_LOV Profile Option

Identify the appropriate assignment in compensation responsive pages by configuring other assignment attributes to display in the Business Title switcher. To do this, use the REST LOV in the Business Title LOV by setting the profile value to Y.

Here's the general behavior of the REST Business Title LOV:

- It appears on the My Compensation, Compensation Info page only when the selected person has more than one assignment.
- It lists assignments that are in any of these HR Statuses: Active, Suspended, Inactive.
- It lists all assignment types except the Offer assignment.
- It supports assignment-level security and lists only those assignments for the selected person that the signed in person has access to.

The ORA\_PER\_EMPL\_ENABLE\_WRK\_ASG\_REST\_LOV profile option setting isn't specific to the My Compensation and Compensation Info pages. It applies to all HCM products that use the new Business Title LOV.

#### *Related Topics*

- [Employment Profile Options](#)



## 4 Profile Options for Salary Actions

### HR\_DISABLE\_PENDING\_APPROVALS\_CHECK\_IN\_HCM\_DATA\_LOADER Profile Option

To load salary changes with HCM Data Loader when related salary is pending approval, enable this option.

The actions pending approvals can be from a standalone salary action, such as Change Salary. Or they can be when salary is part of HR actions that include salary changes, such as Promote or Transfer.

#### Related Topics

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

### ORA\_CMP\_LGT\_WHEN\_MISSING\_SALARY\_DATASECURITY Profile Option

To prevent salary proposals during Global Transfer actions, when the proposers don't have permission to access the source assignment salary, enable this option. Or you can prevent copying salary from the source assignment, but still let people propose it.

In either case, the option applies only when source and destination legal employer have the same legislative data group.

Profile Value	Outcome
Copy and allow entry (default)	Copy the salary from the source assignment and let people make changes.
Don't copy but allow entry	Don't copy the salary from the source assignment, but let people propose a new salary.
Don't copy nor allow entry	Don't copy the salary from the source assignment and don't let people propose a new salary.

When the global transfer can't copy salary from the source assignment to the destination assignment, people can propose salary regardless of the profile configuration. When people have data security access on the source assignment salary, the global transfer copies future salary for certain salary basis types. But when they don't have access, the global transfer doesn't copy future salary, even when people can propose the salary.

#### Related Topics

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

## ORA\_CMP\_NO\_SALARY\_CHANGE\_WHEN\_INACTIVE\_CHG\_A Profile Option

To let people change salary in the Change Assignment action for an inactive assignment or an assignment that will become inactive, disable this profile option. By default, this enabled profile option prevents people from changing salary in these instances.

### *Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

## ORA\_CMP\_SAL\_REUSE\_ASGN\_ACTION\_OCCURRENCE Profile Option

To make salary reuse the action occurrence identifier of the assignment whenever a matching action and reason exists for the salary start date, enable this option.

We recommend that you enable this profile option only if you're using responsive pages and the enhanced Employment Info page released in 22C. Enabling the profile option can affect the action occurrence identifier of the previous salary. For example, you've salary on 2010, 2016, and 2021.

- When an HR specialist creates a salary for 2022, the processing tries to reuse the action occurrence identifier for the 2022 salary and 2021 salary.
- When they change the 2021 salary, processing tries to reuse the action occurrence identifier for the 2021 salary.
- When they delete the 2021 salary, processing tries to reuse the action occurrence identifier for the 2016 salary.

Whenever someone creates or deletes a salary, processing accesses the previous salary to correct the end date. Thus processing also tries to reuse the action occurrence identifier for that salary. Reuse of action occurrence happens whenever people create or correct salary independently using tools, actions and pages, and processes:

- Tools examples:
  - HCM Data Loader or HCM Spreadsheet Data Loader and Salary object
  - Salaries REST API
  - Download Salaries
- Responsive action and page examples:
  - Change Salary (Line Manager)
  - Change Salary (Compensation Manager)
  - Edit Salary from Compensation Info
  - Salary History

- Local and Global Transfer
- Combined Correction and Deletion Employment Details (introduced in 22C update)
- Process examples:
  - Run Rates-based Salary Process
  - Run Grade Step Progression
  - Synchronize Grade Step Rates
  - Workforce Compensation Transfer (only when posting salary, without assignment changes)
  - Mass Legal Employer Change
- Classic action and page example:
  - Change Salary

When assignment has multiple changes on the same day with the same action and reason, we link the salary to the most recent action occurrence. The action occurrence won't get reused while posting assignment and salary changes from Workforce Compensation, because it posts salary changes before assignment changes.

#### *Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

## ORA\_CMP\_SALARY\_CHECKS\_BEHAVIOR\_IN\_CHANGE\_STAR Profile Option

To specify how to handle salary validation failures when someone's hire date changes, use this option. The application checks for salary-related issues and displays an error or warning message depending on the profile option configuration.

When a validation fails and the profile option is set to Error, people can't submit their transaction. But, if the profile option is set to Warning, they get a warning message and can submit their transaction if they ignore the warning.

These are the checks affected by this profile option:

- Is a salary change proposal pending approval?
- Does more than one salary exist for the assignment?
- Is the salary basis no longer active?
- Does the salary amount violate the salary range on the proposed hire date?

## ORA\_PER\_CLE\_COPY\_FUT\_ASG Profile Option

To copy future salary changes as part of the Local and Global Transfer flow, enable this option. For the copy to happen, the source and destination employers need to have the same legislative data group.

*Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

## ORA\_PER\_EMP\_RETAIN\_CHANGES Profile Option

To keep salary changes made during various actions when the proposer returns to the when section and changes the start date, enable this option.

*Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

## ORA\_PER\_EMPL\_DEFAULT\_EFFECTIVE\_DATE Profile Option

Use this option to not default the when date in the responsive Change Salary flow. When you want to make sure that the proposer enters a date, set the profile value for this option to **N**.

*Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)



# 5 Profile Options for Individual Compensation Pages and Actions

## CMP\_DISABLE\_PENDING\_APPROVALS\_CHECK\_IN\_MANAGEMENT Profile Option

To let individuals submit more personal contributions while other contributions are pending approval, enable this option. Also configure access details for the individual compensation plan so that people can't update or stop contributions using the Manage Personal Contributions action.

This profile option affects only individuals submitting personal contributions. Even when it's enabled, people using these actions to submit new allocations still have to wait for pending approvals to be resolved:

- Individual Compensation
- Administer Compensation

### *Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

## CMP\_IC\_DATACHECK\_IN\_NONCMP\_FLOWS Profile Option

To ensure that only people with relevant data security privileges maintain individual compensation in HR actions that have the section, enable this option. People without the necessary privileges who try to add individual compensation get an error about insufficient privileges.

### *Related Topics*

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

## Prevent Submissions Without Changes Profile Options

To prevent people from submitting a Personal Contribution, an Individual Compensation, or an Administer Compensation action without making changes, you need to enable these options. Or you can warn them instead that they haven't made changes.

Profile	Description
ORA_CMP_PERSONAL_CONTRIBUTION_BLANKSUBMIT	Let individuals submit personal contributions without any changes.
ORA_CMP_INDIVIDUAL_COMPENSATION_BLANKSUBMIT	Let people submit allocations without any changes when they use the Individual Compensation task.
ORA_CMP_ADMINISTER_COMPENSATION_BLANKSUBMIT	Let people submit allocations without any changes when they use the Administer Compensation task.

You can set the individual profile to one of these options:

- **Error:** Raise an error when an individual tries to submit without any changes.
- **Warning:** Raise a warning when an individual tries to submit without any changes.
- **Allow:** Let the individual submit without any changes.

Processing tracks changes made in the Individual Compensation section to show the warning or error. Approvers can still edit and submit allocations without making changes, even when you enable any of these options.

#### Related Topics

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

## ORA\_CMP\_BIP\_IC\_SHOW\_INPUT\_VALUES Profile Option

To include input values in the approval notifications for the Manage Personal Contribution, Individual Compensation, and Administer Individual Compensation actions, enable this option. Then approvers can view all the proposed input values and not just the primary input value.

The notification includes the lookup code meanings instead of codes, and the values stored in the input values columns. It doesn't include the meaning or descriptions when the values use validations, such as Value Set and Validation Source.

When you enable or disable this profile option, you affect all notifications generated after that change.

#### Related Topics

- [Overview of Profile Options](#)
- [Create and Edit Profile Options](#)

# ORA\_CMP\_LGT\_WHEN\_MISSING\_IC\_DATASECURITY

## Profile Option

To prevent individual compensation proposals during Global Transfer actions when the proposers don't have permission to access the source assignment allocations, enable this option. Or prevent copying individual compensation allocations from the source assignment, but still let people propose it.

In either case, the option applies only when source and destination legal employer have the same legislative data group.

Profile Value	Outcome
Copy and allow entry (default)	Copy the individual compensation allocations from the source assignment and let people make changes.
Don't copy but allow entry	Don't copy the individual compensation allocations from the source assignment, but let people propose a new salary.
Don't copy nor allow entry	Don't copy the individual compensation allocations from the source assignment and don't let people propose a new salary.

When the global transfer can't copy individual compensation allocations to the destination assignment, people can propose allocations regardless of the profile configuration.

- Related Topics
- [Overview of Profile Options](#)
  - [Create and Edit Profile Options](#)



## 6 Responsive User Experience Setup

### Search Logic Profile Options for Client List of Values

You can use the logic `<codeph>CONTAINS</codeph>` to create the client list of values. This returns results containing the characters you enter.

Optionally, for individual list of values, you could change this logic to `<codeph>STARTS WITH</codeph>`, to return results that start with the search characters you enter.

For example, when you search for a person with the name John Smith while using the logic `CONTAINS`, you can search by `'jo'` or `'sm'` or `'th'`. When you use the logic `STARTS WITH`, your search must start with `'j'`.

Use the logic `STARTS WITH` when your list contains thousands of values (more than 15,000 records) to improve the search performance. Or, if you don't partition your data by set ID.

**Note:** If you change the search logic for a client list of values, the logic changes in all pages where the list of values is used.

#### Related Topics

- [Search Logic Profile Options for Client List of Values in Global Human Resources](#)

### Use Transaction Design Studio to Configure Field Displays

Use the Transaction Design Studio (TDS) to configure transactions and pages for responsive applications. TDS is available within the HCM Experience Design Studio.

You can control the visibility of attributes that are displayed either as **Delivered** or **Enabled**, and the availability of fields and sections of a transaction based on the user's role, person's business unit, or legal employer.

By default, the responsive pages display the often used attributes and hide the less often used attributes. Use Page Composer to personalize the responsive pages and display the attributes and tabs delivered within the feature.

Here's how you start HCM Experience Design Studio:

1. Sign in to the application as Human Capital Management Application Administrator with Access HCM Page Configurator (HRC\_ACCESS\_HCM\_TRANSACTION\_CONFIGURATOR\_PRIV) privilege. This privilege provides you access to TDS in HCM Experience Design Studio.
2. Enable a sandbox to compose data for configuring business objects. On the Home page, click the **HCM Experience Design Studio** quick action under the **My Client Groups** tab.
3. Under **Settings and Actions**, click **Edit Pages**.
4. Select the site layer and click **OK**.

*Related Topics*

- [Overview of Page Modification](#)

## Displayed and Hidden Responsive Compensation Management Fields

You can configure compensation management fields using Transaction Design Studio.

### My Compensation

You can configure these attributes, which make up the My Compensation page.

Attribute	Displayed	Comments
Current Salary	Yes	Section
Additional Compensation	Yes	Section
Personal Contribution	Yes	Section
Prior Salary	Yes	Section
Total Compensation Statements	Yes	Section
Workforce Compensation	Yes	Section
Shares	Yes	Section
Recurring and One-Time Payments	Yes	Section
Salary	Yes	Salary section attribute
Adjustment	Yes	Salary section attribute
Action	No	Salary section attribute
Action Reason	No	Salary section attribute
Start Date	Yes	Salary section attribute
Effective Period	No	Salary section attribute
End Date	No	Salary section attribute
Annual Salary	Yes	Salary section attribute
Annualized Full-Time Salary	No	Salary section attribute
Grade ladder	Yes	Salary section attribute
Grade Name	No	Salary section attribute
Grade Step	No	Salary section attribute
Salary Range	No	Salary section attribute

Attribute	Displayed	Comments
Salary Range Midpoint	No	Salary section attribute
Range Position	Yes	Salary section attribute
Compa-Ratio	No	Salary section attribute
Quartile	No	Salary section attribute
Quintile	No	Salary section attribute
Next Salary Review Date	No	Salary section attribute
Adjustment Amount	Yes	Salary section attribute, displayed with the salary basis type of components type
Adjustment Percentage	Yes	Salary section attribute, displayed with the salary basis type of components type
Percentage	Yes	Salary section attribute, displayed with the salary basis type of components type
Amount	Yes	Salary section attribute, displayed with the salary basis type of components type
Annual Amount	Yes	Salary section attribute, displayed with the salary basis type of components type
Annualized Full-Time Amount	No	Salary section attribute, displayed with the salary basis type of components type
Salary Amount	Yes	Salary drill-down attribute
Estimated Stock Price	No	Stock
Estimated Value of Vested Shares	No	Stock
Estimated Value of Unvested Shares	No	Stock
Business Title	No	

## Compensation Info

You can configure these attributes on the Compensation page.

Attribute	Displayed	Comments
Current Salary	Yes	Section
Show Future and Prior Salary.	Yes	Section
Additional Compensation	Yes	Section
Shares	Yes	Section
Recurring and One-Time Payments	Yes	Section
Salary	Yes	Salary section attribute

Attribute	Displayed	Comments
Adjustment	Yes	Salary section attribute
Start Date	Yes	Salary section attribute
Effective Period	No	Salary section attribute
Action	Yes	Salary section attribute
Action Reason	Yes	Salary section attribute
Salary Basis	Yes	Salary section attribute
End Date	No	Salary section attribute
Annual Salary	Yes	Salary section attribute
Annualized Full-Time Salary	No	Salary section attribute
Grade ladder	Yes	Salary section attribute
Grade Name	No	Salary section attribute
Grade Step	No	Salary section attribute
Salary Range	No	Salary section attribute
Salary Range Midpoint	No	Salary section attribute
Range Position	Yes	Salary section attribute
Compa-Ratio	No	Salary section attribute
Quartile	No	Salary section attribute
Quintile	No	Salary section attribute
Next Salary Review Date	No	Salary section attribute
Adjustment Amount	Yes	Salary section attribute, displayed with the salary basis type of components type
Adjustment Percentage	Yes	Salary section attribute, displayed with the salary basis type of components type
Percentage	Yes	Salary section attribute, displayed with the salary basis type of components type
Amount	Yes	Salary section attribute, displayed with the salary basis type of components type
Annual Amount	Yes	Salary section attribute, displayed with the salary basis type of components type
Annualized Full-Time Amount	No	Salary section attribute, displayed with the salary basis type of components type
Currency	Yes	None
Estimated Stock Price	No	Stock
Estimated Value of Vested Shares	No	Stock



Attribute	Displayed	Comments
Estimated Value of Unvested Shares	No	Stock
Currency	No	None
Business Title	No	None

## Salary Attributes

You can configure these salary attributes, which make up the salary sections on various compensation pages. They're also part of various Offer and HR flows, such as Offer, Hire, Promote, and Transfer.

Attribute	Displayed	Comments
Start Date	Yes	None
Action	Yes	None
Action Reason	Yes	None
End Date	No	None
Salary Basis	Yes	None
Salary Amount	Yes	None
Adjustment Amount	Yes	For salary components, the value appears in the table.  This attribute doesn't appear in the new Offers and New Hire flows delivered in 18C.
Adjustment Percentage	Yes	For salary components, the value appears in the table.  This attribute doesn't appear in the new Offers and New Hire flows delivered in 18C.
Annual Salary	Yes	None
Annualized Full-Time Salary	No	None
Next Salary Review Date	No	None
Grade Name	Yes	None
Salary Range	No	Analytic displays salary range when available.
Salary Range Mid Point	No	None
Compa-Ratio	Yes	None
Range Position	No	None
Quartile	No	None
Quintile	No	None

Attribute	Displayed	Comments
Currency	No	None

## Shares Section

You can configure these stock shares attributes on the My Compensation and Compensation Info pages.

Attribute	Displayed	Comments
Total Shares	Yes	None
Vested Shares	Yes	None
Unvested shares	Yes	None
Granted	Yes	None
Original Grant Price	Yes	None
Estimated Stock Price	No	Hidden by default
Estimated Value of Vested Shares	No	Hidden by default
Estimated Value of Unvested Shares	No	Hidden by default
Unvested Value	Yes	None

## Salary History

You can configure the attributes in the two regions on the Salary History pages.

Salary History section

Attribute	Displayed	Comments
Start Date	Yes	None
Action	Yes	None
Action Reason	Yes	None
End Date	No	None
Salary Basis	Yes	None
Salary Amount	Yes	None
Adjustment Amount	Yes	None
Adjustment Percentage	Yes	None
Annual Salary	Yes	None
Next Salary Review Date	Yes	None

Attribute	Displayed	Comments
Placement in Salary Range	Yes	None
Quartile	Yes	None
Quintile	No	None
Compa-Ratio	Yes	None
Range Position	No	None
Salary Range	No	None
Salary Range Midpoint	No	None
Created By	No	None
Created On	No	None
Updated By	No	None
Updated On	No	None
Grade Ladder	Yes	Appears when on grade ladder
Grade name	Yes	None
Grade Step	Yes	Appears when on grade ladder, step
Comments and Attachments	Yes	Controls the display of the Comments and Attachment section
Currency to Use	No	None

### Salary Details section

Attribute	Displayed	Comments
Start Date	Yes	None
Action	Yes	None
Action Reason	Yes	None
End Date	No	None
Salary Basis	Yes	None
Salary Amount	Yes	None
Adjustment Amount	Yes	None
Adjustment Percentage	Yes	None
Annual Salary	Yes	None
Annualized Full-Time Salary	Yes	None
Next Salary Review Date	Yes	None

Attribute	Displayed	Comments
Compa-Ratio	Yes	None
Quartile	Yes	None
Quintile	Yes	None
Range Position	Yes	None
Reason	Yes	None
Salary Range	Yes	None
Salary Range Midpoint	Yes	None
Compensation Zone	Yes	Appears while using compensation zone based differential profile
Compensation Zone Type	Yes	Appears while using compensation zone based differential profile
Working at Home	Yes	Appears while using compensation zone based differential profile
Grade Ladder	Yes	Appears when on grade ladder
Grade name	Yes	None
Grade Step	Yes	Appears when on grade ladder, step
Currency to Use	No	None
Prior Salary	Yes	None

#### Related Topics

- [Use Transaction Design Studio to Configure Field Displays](#)

## Displayed and Hidden Responsive Team Compensation Fields

You can configure team compensation fields using Transaction Design Studio.

### Assignment

You can configure these assignment attributes, which make up the Overview, Compensation, and Talent tabs of the My Team pages.

Attribute	Displayed	Comments
Image	Yes	None

Attribute	Displayed	Comments
Person Display Name	Yes	None
Business Title	Yes	Formerly known as Assignment Name. For incumbents, this field isn't displayed by default.
Number of direct reports and total number of reports	Yes	None
Text for non-primary assignments	Yes	None
Text for suspended assignments	Yes	None
Icon and text for dotted line/matrix relationships	Yes	Includes text for relationship type. Line manager relationships don't display this field.
Text for worker type	Yes	Not displayed for individuals.
Person List Name	No	None
Preferred Name (or Known As) and Last Name	No	None
Person Number	No	None
Assignment Number	No	None
Job Name	No	None
Job Code	No	None
Job Name and Job Code	No	None
Position Name	No	None
Position Code	No	None
Position Name and Position Code	No	None
Location Name	No	None
Location Code	No	None
Location Name and Location Code	No	None
Country Name	No	None
Country Code	No	None
Location Name and Country Code	No	None
Local Time and Location Name	No	None
Work E-mail Address	No	None
Work Phone Number	No	None
Assignment Type	No	None
Legal Employer	No	None
Legislation	No	None

Attribute	Displayed	Comments
Legislation Code	No	None
Cost Center	No	None
Department Name	No	None
Grade Name	No	None
Grade Code	No	None
Service Years	No	None
Business Unit	No	None
Current Salary, Currency and Basis	No	None
Salary Range, Currency and Basis	No	None
Compa-Ratio	No	None
Development Goals	No	None
Performance Goals	No	None
Performance	No	None
Potential	No	None
Risk of Loss	No	None
Impact of Loss	No	None
Talent Score	No	None

## Team Compensation

You can configure this team compensation attribute.

Attribute	Displayed
Current to Use	Yes

## Position

You can configure these position attributes, which make up the Overview, Compensation, and Talent tabs of the My Team pages.

Attribute	Displayed	Comments
Position Name	Yes	None
Position Code	Yes	None

Attribute	Displayed	Comments
Business Unit	Yes	This field isn't displayed by default on mobile devices.
Number of direct reports and total number of reports	Yes	None
Headcount and FTE of incumbents	Yes	None
Headcount and FTE of open positions	Yes	None
Department Name	No	None
Location Name	No	None
Job Name	No	None
Entry Grade	No	None
Valid Grades	No	None
Grade Ladder	No	None
Position Headcount and FTE	No	None
Hiring Status	No	None
Type	No	None

## Requisition

You can configure these requisition attributes on the Overview tab of the My Team pages.

Attribute	Displayed
Requisition Title	Yes
Requisition Number	Yes
Requisition Status	Yes
Recruiter	Yes
Number of Candidates	No
Days Since Opened	No
Location	No
Department	No
Work Location	No
Job Name	No
Job Family	No
Job Function	No

Attribute	Displayed
Job Grade	No
Requisition Template	No
Internal Title	No
Number to Hire	No
Unlimited Hire	No

## Vacancy

You can configure these vacancy attributes on the Overview tab of the My Team pages.

Attribute	Displayed
Vacancy Job	Yes
Department	Yes
Location	Yes
Openings	Yes
Requisition Number	No
Position Name	No
Remaining Openings	No

### Related Topics

- [Use Transaction Design Studio to Configure Field Displays](#)



# 7 Approvals Overview

## How Default Approval Tasks for Salary and Individual Compensation Work

You can route salary changes, individual compensation allocations, and workforce compensation allocations to the appropriate approvers using approval workflow tasks.

You can configure the approval rules to support your compensation policies using these tasks in the Define Approval Management for Human Capital Management task list:

- Manage Task Configurations for Human Capital Management
- Manage Approval Groups

To find the task list, click Search on the Setup and Maintenance work area, Tasks panel tab.

### Manage Task Configurations for Human Capital Management

Approval tasks are event-driven configurations containing rules that identify the approval routing and approvers for business objects, such as salary changes and compensation allocations.

- On the task Configuration tab of the workflows, the Once per stage task aggregation ensures that the approval process sends only one notification per approver.
- The Assignees tab provides a technical view of each task and is where you go to the task rules.

Here's what the default compensation approval tasks do:

Task Name	Description
ChangeSalaryApprovalTask	<p>Runs when someone submits a salary change from the Salary section of compensation page, or using the Change Salary task or quick action. This approval task doesn't run for changes identified by the Run Grade Step Progression or Synchronize Grade Step Rates processes.</p> <p>Sends actionable notifications to the manager of the person who's salary is changing, to approve or reject the salary changes.</p> <ul style="list-style-type: none"><li>• If the manager rejects the change, the task is complete.</li><li>• If the manager approves the change, the task sends an actionable notification to their manager to approve or reject the change. Regardless of the second manager's action, the task stops at this level of the supervisor hierarchy.</li></ul>
SalaryHistoryApprovalTask	<p>Runs when someone submits a salary change from the Salary History action, quick action, or task.</p> <p>Sends actionable notifications to the approver, to approve or reject the salary changes.</p>
VariableAllocationTask	<p>Runs when someone submits an individual compensation or personal contribution allocation.</p> <p>Sends actionable notifications to the manager of the person getting the individual compensation allocation or making the personal contribution, to approve or reject the allocation.</p>

Task Name	Description
	<ul style="list-style-type: none"><li>• If the manager rejects the allocation, the task is complete.</li><li>• If the manager approves the allocation, the task sends an actionable notification to their manager to approve or reject the allocation. Regardless of the second manager's action, the task stops at this level of the supervisor hierarchy.</li></ul>

None of these approval workflow tasks include threshold rules by default. You can configure thresholds according to 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 the salary change exceeds 10 percent:

```
Task.payload.getSalaryApprovalValuesResponse.result/value.newChangePercent more than 10.00.
```

## Manage Approval Groups

By default, the delivered actionable approval workflow tasks route time cards using the dynamically decided supervisor hierarchy. You can identify specific approvers to route to instead using the Manage Approval Groups task.

ApprovalTimeRecordGroup attribute values vary by implementation. To figure out your value mapping, create your own data model report in the Reports and Analytics work area using this query:

```
select * from FUSION.cmp_col_attr_map where LOCATION like 'Approval' and ENTERPRISE_ID = <ent_id>;
```

**Tip:** You can define rules on the primary input value using the Worker's Other Compensation.Details.Amount attribute.

### Related Topics

- [How You Define Approvals for Human Capital Management](#)
- [The Manager Hierarchy: How It's Maintained](#)
- [Guidelines for Managing Approval Rules](#)
- [Approver Types](#)
- [HCM Approval Rules](#)

## How You Configure Different Approval Flows for Individual Compensation Allocations and Personal Contributions

To configure different approval flows for individual compensation allocations and personal contributions, include the module identifier for the action in your rules.

Action	Module Identifier
Individual Compensation	<code>(Task.payload.transactionApprovalRequest.moduleIdentifier == "Change Variable Allocation")</code>

Action	Module Identifier
Manage Personal Contribution	<code>(Task.payload.transactionApprovalRequest.moduleIdentifier == "Make Personal Contribution")</code>
Administer Individual Compensation	<code>(Task.payload.transactionApprovalRequest.moduleIdentifier == "Administer Variable Allocation")</code>

Related Topics

- [How Default Approval Tasks for Salary and Individual Compensation Work](#)
- [Route Approval for Individual Compensation or Personal Contribution Allocation by Action](#)

# How You Can Validate Salary and Responsive Individual Compensation Approval Rule Changes

Test approval rule changes for responsive salary and individual compensation processes and actions without creating and submitting any new transactions. This way, you can debug and incrementally build conditional logic for approval rules, then instantaneously see the effects.

Use the HCM Approval Rules page and Transaction Console for these responsive processes and actions:

Salary Processes and Actions	Individual Compensation Processes and Actions
<ul style="list-style-type: none"><li>• Administer Individual Compensation</li><li>• Manage Individual Compensation</li><li>• Manage Personal Contributions</li></ul>	<ul style="list-style-type: none"><li>• Administer Individual Compensation</li><li>• Manage Individual Compensation</li><li>• Manage Personal Contributions</li></ul>

This validation doesn't apply to classic individual compensation workflows because you can see the approval chain on the transaction Review page.

You need to first commit any changes you make to the approval rules before you simulate the rules. You can search for transactions by name, who created them, and created during a date range. To further refine your results, use the Status field. The available statuses are Draft, In Progress, and Failed. Select from the list of filtered transactions and use those values to simulate the approval rule results.

**Tip:** To test the approval flow configuration for new transactions, you need to disable bypass approvals. But you can test the approval flow configuration for pending, draft, and failed transactions when bypass approvals is enabled.

**Note:**

For more information, see these Oracle HCM Cloud Common Features Release 13 Transaction Console documents (ID [2430452.1](#)) on My Oracle Support.

- [The Basics of Approval Rules](#)

- The Basics of Transaction Console

# 8 Example Approval Configurations

## Autoapprove a Salary Change If the Requester Is an HR Specialist

You control salary approvals with the ChangeSalaryApprovalTask workflow. Here's how you can configure the default workflow to automatically approve salary changes if the requester has the HR Specialist role.

### Scenario

Edit approval workflows using the Manage Task Configurations for Human Capital Management task in the Setup and Maintenance work area. Complete this configuration of the THEN fields on the Assignees tab.

THEN Field	Value
List Builder	Supervisory
Response Type	Required This response type makes the notification actionable, instead of just informational.
Number of levels	1
Starting Participant	<code>HierarchyBuilder.getManager("supervisory",Task.payload.transactionApprovalRequest.Requ</code>
Top Participant	<code>HierarchyBuilder.getManager("supervisory",Task.payload.transactionApprovalRequest.Requ</code>
Auto Action Enabled	True
Auto Action	"APPROVE"
Rule Name	AutoapproveHRSpecialist

#### Related Topics

- [How Default Approval Tasks for Salary and Individual Compensation Work](#)

## Grade Determines the Levels of Approval for a Salary Change

You control salary approvals with the ChangeSalaryApprovalTask workflow.

Here's an idea of how you can configure the default workflow to set different levels of required approval. In this example, the required levels depend on the grade. If the requester's grade is X, then require only one level of approval. If the requester's grade is Y, then require two levels of approval.

## Scenario

Edit approval workflows using the Manage Task Configurations for Human Capital Management task in the Setup and Maintenance work area. Complete these steps on the Assignees tab.

1. Create the rule where the requester's grade is X.

a. Create this IF expression:

```
Task.payload.Requestor's Assignment.result.grade.toUpperCase() is "X"
```

b. Complete the THEN fields, as shown here.

Then Field	Value
List Builder	Supervisory
Response Type	Required  This response type makes the notification actionable, instead of just informational.
Number of levels	1
Starting Participant	<code>HierarchyBuilder.getManager("supervisory",Task.payload.transactionApprovalRece</code>
Top Participant	<code>HierarchyBuilder.getManager("supervisory",Task.payload.transactionApprovalRece</code>
Auto Action Enabled	False
Auto Action	null
Rule Name	<code>1LevelforGradeX</code>

2. Create the rule where the requester's grade is Y.

a. Create this IF expression:

```
Task.payload.Requestor's Assignment.result.grade.toUpperCase() is "Y"
```

b. Complete the THEN fields, as shown here.

Then Field	Value
List Builder	Supervisory
Response Type	Required  This response type makes the notification actionable, instead of just informational.

Then Field	Value
Number of levels	2
Starting Participant	<code>HierarchyBuilder.getManager("supervisory",Task.payload.transactionApprovalRe</code>
Top Participant	<code>HierarchyBuilder.getManagerOfHierarchyPrincipal("supervisory",HierarchyBuilder ("supervisory",Task.payload.transactionApprovalRequest.Requestor,-1,null,nul</code>
Auto Action Enabled	False
Auto Action	null
Rule Name	<code>2LevelsforGradeY</code>

#### Related Topics

- [How Default Approval Tasks for Salary and Individual Compensation Work](#)

## Route Approval for a Salary Change According to Country and Amount

You control salary approvals with the `ChangeSalaryApprovalTask` workflow.

Here's an idea of how you can configure the default workflow to route the approval depending on the country and amount. In this example, the country is the US. If the amount is more than 10,000, the approval routes to X and Y and then the area of responsibility. If the amount is less than 10,000, it routes to only the area of responsibility.

### Scenario

Edit approval workflows using the Manage Task Configurations for Human Capital Management task in the Setup and Maintenance work area. Complete these steps on the Assignees tab.

1. Create the rule where the country is US and the amount is more than 10,000.

- a. Create this IF expression:

```
Task.payload.Requestor's Assignment.result.legislationCode.toUpperCase() is "US"  
andSalaryApproval.newChangeAmount.doubleValue() more than 10000
```

- b. Complete the THEN fields for users X, as shown here.

THEN Field	Value
List Builder	Resource

THEN Field	Value
Response Type	Required  This response type makes the notification actionable, instead of just informational.
Users	X
Groups	null
Application Role	null
Rule Name	USover1000usersX

- c. Complete the THEN fields for users Y, as shown here.

THEN Field	Value
List Builder	Resource
Response Type	Required  This response type makes the notification actionable, instead of just informational.
Users	Y
Groups	null
Application Role	null
Rule Name	USover1000usersY

- d. Complete the THEN fields for users according to their area of responsibility, as shown here.

THEN Field	Value
List Builder	Resource
Response Type	Required



THEN Field	Value
	This response type makes the notification actionable, instead of just informational.
Users	<code>GetRepresentative("HR_REP",Task.payload.Worker's Current Representative.result)</code>
Groups	null
Application Role	null
Rule Name	<code>USover1000usersAOR</code>

2. Create the rule where the country is US and the amount is less than 10,000.

a. Create this IF expression:

```
Task.payload.Requestor's Assignment.result.legislationCode.toUpperCase() is "US"
andSalaryApproval.newChangeAmount.doubleValue() less than 10000
```

b. Complete the THEN fields, as shown here.

THEN Field	Value
List Builder	Resource
Response Type	Required  This response type makes the notification actionable, instead of just informational.
Users	<code>GetRepresentative("HR_REP",Task.payload.Worker's Current Representative.result)</code>
Groups	null
Application Role	null
Rule Name	<code>USunder1000usersAOR</code>

*Related Topics*

- [How Default Approval Tasks for Salary and Individual Compensation Work](#)

# Route Approval for Recurring Individual Allocation When the Amount Changes by a Percentage

You control individual compensation approvals with the VariableAllocationTask workflow.

Here's how you can configure the default workflow to handle approvals for percentage changes to recurring awards made using responsive compensation pages. You use an approval configuration like this because the responsive pages split updates at submission. In this example, you configure these variable allocation rules to account for both recurring and nonrecurring elements associated with the awards and contributions.

Rule Name	Purpose
RecurUnder10%	Route recurring awards and contributions with changes that are less than 10%.
OnetimeUnder10%	Route onetime awards and contributions with changes that are less than 10%.
Onetime10%plus	Route onetime awards and contributions with changes that are 10% or more.
Recur10%plus	Route recurring awards and contributions with changes that are 10% or more.

**CAUTION:** To make sure that any simultaneous updates happen correctly, confirm that the elements associated with the individual compensation plans have Multiple entries not allowed selected.

Edit approval workflows using the Manage Task Configurations for Human Capital Management task in the Setup and Maintenance work area. Complete these steps on the Assignees tab.

## Enable Advanced Mode

1. Expand the VariableAllocationRules rule.
2. Click the **Show Advanced Settings** icon, which is between the **Expand** icon and the rule name.
3. Select **Advanced Mode**.

## Create the `RecurUnder10%` Rule

1. Create this IF expression:

```
Task is a Task
and
Lists is a Lists
and
Each {
  ICD is a Worker's Other Compensation Details and
  FirstAmount = ICD.Amount.doubleValue() and
  Frequency = ICD.Other Compensation Award Frequency and
  FirstPlanId = ICD.planId and
  FirstOptionId = ICD.Other Compensation Option Id and
  Mflag = ICD.multipleEntriesAllowedFlag.toUpperCase()
and
  ICD2 is a Worker's Other Compensation Details and
  SecondAmount = ICD2.Amount.doubleValue()
```

```

ChangePercent = ((SecondAmount-FirstAmount/FirstAmount)*100
SecondPlanId = ICD1.planId
SecondOptionId = ICD2.Other Compensation Option Id
(Frequency is "R" and
Mflag is "Y" and
SecondPlanId is FirstPlanId and
SecondOptionId is FirstOptionId and
ChangePercent less than 10.00 and
ChangePercent more than 0)
}

```

2. Complete the THEN fields, as shown here.

THEN Field	Value
List Builder	Resource
Response Time	Required  This response type makes the notification actionable, instead of just informational.
Users	X
Groups	null
Application Role	null
Rule Name	"RecurUnder10%"
Dimension Id	null

## Create the `OnetimeUnder10%` Rule

1. Create this IF expression:

```

Task is a Task
and
Lists is a Lists
and
Each {
  ICD is a Worker's Other Compensation Details and
  ICD.Other Compensation Change in Value Percentage less than 10.00
}

```

2. Complete the THEN fields, as shown here.

THEN Field	Value
List Builder	Resource
Response Time	Required
Users	X
Groups	null

THEN Field	Value
Application Role	null
Rule Name	"OnetimeUnder10%"
Dimension Id	null

## Create the `Onetime10%plus` Rule

1. Create this IF expression:

```
Tasks is a Task
and
Lists is a Lists
and
Each {
  ICD is a Worker's Other Compensation Details and
  ICD.Other Compensation Change in Value Percentage.doubleValue() same or more than 10.00
}
```

2. Complete the THEN fields, as shown here.

THEN Field	Value
List Builder	Resource
Response Time	Required  This response type makes the notification actionable, instead of just informational.
Users	X
Groups	null
Application Role	null
Rule Name	"Onetime10%plus"
Dimension Id	null

## Create the `Recur10%plus` Rule

1. Create this IF expression:

```
Task is a Task
and
Lists is a Lists
and
Each {
  ICD is a Worker's Other Compensation Details and
  FirstAmount = ICD.Amount.doubleValue() and
  Frequency = ICD.Other Compensation Award Frequency and
```

```

FirstPlanId = ICD.planId and
FirstOptionId = ICD.Other Compensation Option Id and
Mflag = ICD.multipleEntriesAllowedFlag.toUpperCase()
and
ICD2 is a Worker's Other Compensation Details and
SecondAmount = ICD2.Amount.doubleValue()
ChangePercent = ((SecondAmount-FirstAmount)/FirstAmount)*100
SecondPlanId = ICD2.planId
SecondOptionId = ICD2.Other Compensation Option Id
(ChangePercent same or more than 10.00 and
Frequency is "R" and
Mflag is "Y" and
SecondPlanId is FirstPlanId and
SecondOptionId is FirstOptionId and
ChangePercent more than 0)
}

```

2. Complete the THEN fields, as shown here.

THEN Field	Value
List Builder	Resource
Response Time	Required
Users	X
Groups	null
Application Role	null
Rule Name	"Recur10%plus"
Dimension Id	null

#### Related Topics

- [How Default Approval Tasks for Salary and Individual Compensation Work](#)

## Autoapprove Personal Contributions

You control salary approvals with the VariableAllocationTask workflow. Here's how you can configure the default workflow to automatically approve personal contributions.

### Scenario

Edit approval workflows using the Manage Task Configurations for Human Capital Management task in the Setup and Maintenance work area. Complete these steps on the Assignees tab.

1. Create this IF expression:  

```
(Task.payload.transactionApprovalRequest.moduleIdentifier == "Make Personal Contribution")
```
2. Complete the THEN fields, as shown here.

THEN Field	Value
List Builder	Supervisory
Response Type	Required This response type makes the notification actionable, instead of just informational.
Number of levels	1
Starting Participant	<code>HierarchyBuilder.getPrincipal(Task.payload.transactionApprovalRequest.Requestor,</code>
Top Participant	<code>HierarchyBuilder.getPrincipal(Task.payload.transactionApprovalRequest.Requestor,</code>
Auto Action Enabled	True
Auto Action	"APPROVE"
Rule Name	<code>AutoapprovePersonalContribution</code>

#### Related Topics

- [How Default Approval Tasks for Salary and Individual Compensation Work](#)

## Route Approval for Individual Compensation or Personal Contribution Allocation by Action

You can route individual compensation and personal contribution allocations to different approvers depending on the action used to make the allocation. Make these changes to individual compensation and personal contribution approval rules using the **Navigator > Tools > Transaction Console** task.

1. On the Transaction Manager: Transactions page, click the Approval Rules tab.
2. On the Transaction Manager: Rules page, search for and click any process you want to change:
  - Administer Individual Compensation
  - Manage Individual Compensation
  - Manage Personal Contributions
3. If the process configuration bypasses approvals, click the **Bypass Approvals** icon to turn off the bypass.

### Add a Rule

1. Click the corresponding **Configure Rules** icon.
2. On the Approval Rules page, click the **Add New Rule** icon.
3. On the graphic, click the rule oval that just appeared, for example, **Rule1**.

## Configure the Rule to Route by the Module Identifier

1. In the Rule: Add Details section, enter a rule name, such as **Administer Action**, **Manage Action**, or **Contribution Action**.
2. Click **Configure Rule Conditions**.
3. On the Condition Details dialog box, click the box with the existing expression **1 == 1**.
4. Click **Edit Selection**.
5. On the Approval Rules: Edit Condition Expression dialog box, change **Enter a number** to **Select from attribute**.
6. In the **Select Attribute** list, select **transactionApprovalRequest > moduleIdentifier**.
7. Change **Select Operator** to **==**.
8. Change **Select value type** to **Enter a string**.
9. In the field that appears, enter the appropriate module identifier:

Action	Module Identifier
Make Personal Contribution	Make Personal Contribution
Individual Compensation	Change Variable Allocation
Administer Individual Compensation	Administer Variable Allocation

10. Click **OK**.
11. On the Condition Details dialog box, review the expression. It should look something like this expression for the Administer Individual Compensation module identifier:

```
(transactionApprovalRequest.moduleIdentifier == "Administer Variable Allocation")
```

12. Click **OK**.

## Add the Approver

1. On the Approval Rules page graphic, in the path of your new rule, click the **THEN** object to highlight it.
2. In the Approvers pane, click the **Add Approver Participant** icon next to the appropriate approver, such as Representative.
3. Click **Submit**.

### Related Topics

- [How You Configure Different Approval Flows for Individual Compensation Allocations and Personal Contributions](#)





# 9 Market Data

## Overview of Market Data

Various job evaluation methods exist as a way to price jobs according to their worth. Market data are a method to price jobs that are externally focused, so you attract and retain workers based on the labor market.

The foundation for any job evaluation method, including market data, is to start with good job descriptions.

You might want to compare your salaries, salary ranges, and other compensation such as bonus or stock to prepared industry-wide data to make sure your compensation is in line with your company's goals. For example, you might want to make sure you award your people at the 50th percentile of the industry average by job and location. Or you might want to award base pay at a lower percentile but award stock at a higher level.

With market data you map external survey jobs and locations with internal jobs and locations. Then, you import the surveys and use the market data subject area in OTBI to consolidate the data. After you create composites of your survey data, you import these composites. Finally you can display the composites in the worksheet or administer workers in Workforce Compensation.

You can find the market data tasks in the Compensation work area under Market Data.

Here's a diagram that shows you the market data task flow:



Here are the steps that you take to import and use survey data and convert them to composites.

1. Decide which surveys to buy and participate in.
2. Receive surveys from suppliers.
3. Use OTBI to help you complete surveys.
4. Return surveys to the suppliers.
5. Receive survey results from each supplier.
6. Import the surveys using the Import Survey task.
7. Use OTBI to analyze your people's data versus the surveys' data.
8. Take any actions based on your analysis, such as, updating salary ranges or aligning salaries with the market.
9. Use OTBI to aggregate surveys into composites.

10. Import composites using the Import Composites task.
11. Display composites in Workforce Compensation.
12. Line managers and administrators make compensation allocation decisions based on the composites.

**Note:** If you already have composites, you can start from step 10. However, in that case, the survey data won't be in the subject area.

#### *Related Topics*

- [Overview of Market Data](#)
- [Import Survey for Market Data](#)
- [Import Composites for Market Data](#)

## Compensation Types for Market Data

Your first task is to define the compensation types that you want to display in market data. Compensation types let you identify different kinds of pay, such as base salary and bonus, and import survey data for each type.

You can find the Compensation Types page in the Compensation work area under Market Data.

The Compensation Types page is where you identify the market target. For example, if you target the 50th percentile of the market for Base Salary then you can select that option. If you target the 40th percentile for base salary and the 60th percentile for bonus, then this is where you identify that mix of pay. The target appears in market composites wherever they occur in the application.

We deliver several common compensation types, but you can add your own. For example, you might want to offer supplemental life insurance to executives and review that across competitors in the survey data. Create a compensation type with the name Executive Benefit Supplemental Life Insurance. Select the Compensation Group of Benefits and a Data Type of Other.

If you need to set market targets separately for different countries, create and load survey data in that manner. For example, if the India salary market target is 60% and United States is 50%, create separate compensation types for them. Load the India salary with one compensation type and the US salary with another.

#### *Related Topics*

- [Overview of Market Data](#)

## Overview of Supplier Structures

The Supplier Structures page in the compensation work area is where you match your internal jobs and locations to survey jobs and locations.

You start by adding your suppliers and their surveys. You can have multiple suppliers and each supplier can have multiple surveys. On the Manage Job List page, you load or manually add survey jobs and match them to your internal jobs or positions. On the Manage Location List page, you can load or manually add survey locations and match them to internal locations. You can match several internal locations to a survey location.

Here's a list of the subtasks under the supplier structures task:

Page	Description
Manage Surveys	You add your suppliers and their surveys on this page. You can have multiple suppliers and each supplier can have multiple surveys. You add details for each supplier. For example, you can add a supplier like Hay. And then you can add surveys from Hay like Hay Professional Survey and Hay Executive Survey.
Manage Job Structures	You can associate job function, job family and other structures to survey jobs. These are entirely optional. If you do use these values you need to configure them before you add jobs. Then, you can select the attributes from job structures when you're in the Manage Job List page. Job structures are Job Family, Job Function, Career Stream or Band, or Career Level. You can use the Manage Jobs Structures task to contain info about the survey jobs per se. This associates these Job Structures to survey jobs only. It's not tied to internal jobs.
Manage Job List	<p>You can load or manually add survey jobs or positions and match them to your internal jobs or positions. At the top of the page there's info about the number of survey jobs and what you've matched. If you want to use any of the Job Structures (Job Function, Job Family, Career Stream or Band, Career Level or Other Level) associated to Survey Jobs, be sure to add them first or they won't be available to select. These are optional.</p> <p>You use the Job Match Notes section to record notes about why job matches change over time. For example, last year you might have recorded internal Accountant 1 as a match to survey Accountant. But this year changes in the internal job description for Accountant 1 no longer matches the survey description for Accountant. Because you might need to explain this to the survey auditor at a later time, it's a good idea to make a note about your decision when it occurred.</p>
Manage Location List	<p>On the Manage Location List page, you can load or manually add survey locations and match them to internal locations. You can match many internal locations to a survey location.</p> <p>You can map on a many to 1 basis here. This is helpful especially if the survey location is broader than your internal locations. For example, if the survey location is Northern California, then you can include all of your Northern California locations, such as Pleasanton and Oakland in the mapping.</p> <p>This helps your downstream analysis by associating the survey data with all the employees in those internal locations. Another example is if the survey data is by country, and you have a few locations in that country.</p>

#### Related Topics

- [Overview of Market Data](#)

## How You Match a Survey Job or Position to Your Internal Data

In the Match Internal Job or Position section, you match the survey job to your job or position.

Search for the internal job or position code that matches the survey job. If you've identified parent benchmark jobs in Global HR, the child jobs appear below the match.

#### Related Topics

- [Overview of Supplier Structures](#)

## Difference Between Global HR Benchmark Jobs and Survey Benchmark Jobs

The Parent Job or Global HR Benchmark indicator refers to a setting in Jobs in Global HR.

Here's the difference between Global HR Benchmark jobs and Survey Benchmark jobs.

- Survey benchmark jobs are matched to internal jobs or positions in Supplier Structures. Any of your internal jobs that you match to survey jobs, are survey benchmark jobs.
- Parent Job or Global HR benchmark jobs are indicated that way in the job table, and have child jobs associated with them.

#### Related Topics

- [Overview of Supplier Structures](#)

## Import Survey for Market Data

Surveys are market data from an individual supplier.

You can use the Create Import Template button on the Import Market Data page to invoke the HSDL. You can only load surveys and not manually add them. However, after you load them, you can modify editable columns like dates, and percentiles. You can use the HCM Data Loader to create survey records when you implement Market Data for the first time or provide regular updates.

#### Before You Start

Here's some things to consider before you begin.

- You need to have a supplier and a survey, with survey jobs and locations, before you import surveys. You can use existing compensation types.
- The **Batch Name**, **Supplier Code**, **Survey Code**, **Survey Location Code**, **Survey Job Code**, **Compensation Type Code**, and **Industry** fields are required.
- The industry column can't be blank. It can be All, ALL, #NULL, or anything else.

## Generate the Workbook

Create the market data workbook in the Compensation work area.

1. On the Tasks panel tab under Market Data click **Import Survey**.
2. On the Import Survey page, click **Create Import Template** to create the workbook.

## Enter Survey Data

Add enough rows to accommodate your supplier's data. Copy the market 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 Survey 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 Import Survey 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.

Use the Data Exchange work area under My Client Groups to see the upload. You see if the process completed successfully and learn about any error messages.

### Related Topics

- [Overview of Market Data](#)
- [Guidelines for Loading Market Data Objects](#)

## Market Segments

Market segments are groups of locations.

After you review your survey and internal locations you can select segments or locations based on geographic labor market pay differences. You can find the Market Segments task in the Compensation work area under Market Data.

You can decide, for example, that some of your market data should use internal locations for market comparisons, while other portions of your organization need segmentation. You might want to consolidate internal locations into market segments if your composites in some locations are all the same. Let's say you have 3 offices in the San Francisco Bay Area, and the market data for those is the same.

Rather than loading the same data 3 times into 3 locations, you can create a market segment that includes your 3 locations and load the composites once. You might decide that the administrative jobs data differs enough locally in the Bay Area that you want to use internal locations for those jobs. However, the manager jobs don't have such local differentiations. Load the administrative jobs using internal locations, and load the managerial jobs using segments.

#### Related Topics

- [Overview of Market Data](#)

## Import Composites for Market Data

Composites are aggregated survey data. They are summaries of all survey data.

Composites are mapped to your internal jobs or positions, and internal locations or segments.

**Note:** If you use only 1 survey, the survey tables hold the raw survey data from the supplier, while the composite table holds your vetted data that you prepared for line manager consumption.

You can use the **Create Import Template** button on the Import Market Composite page to invoke the HDSL. You can also use the HCM Data Loader to upload the consolidated surveys from the suppliers.

### Before You Start

Here's some things to consider before you begin.

- Make sure to load only segment or location within a row, and not both. If you use location, you need to make sure the segment column has a #NULL in it.
- Similarly, make sure to load only job or position within a row, and not both. If you use position, you need to make sure the job column has #NULL in it.
- The industry column can't be blank. It can be All, ALL, #NULL, or anything else.
- Use internal codes for jobs, positions or locations, and not the survey codes you use to load composites.
- Remember: composites are no longer raw survey data, but aggregations of all the surveys, so any individual survey codes no longer apply.

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

- To view in workforce compensation you need to enter a market composite effective date for the plan cycle.
- To see the individual worker view you need to create a market composite tile in the individual worker view task.

## Generate the Workbook

Create the market data workbook in the Compensation work area.

1. On the Tasks panel tab under Market Data click **Import Composites**.
2. On the Import Composites page, click **Create Import Template** and select either **Load by Segment** or **Load by Location** to create the workbook.

## Enter Composite Data

Add enough rows to accommodate your composite data. Copy the composites 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 Composites

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 Import Composites 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.

Use the Data Exchange work area under My Client Groups to see the upload. You see if the process completed successfully and learn about any error messages.

### Related Topics

- [Overview of Market Data](#)
- [Guidelines for Loading Market Data Objects](#)



# Options to View Market Composites in Compensation

You can view market composites in workforce compensation and in market data.

## Market Composite Views

To view in workforce compensation you need to do the following in the Workforce Compensation Plans setup task:

- Enter a market composite effective date on the Configure Plan Cycles page.
- Enable market composites column on the Configure Worksheet Page Layout page, Detail Table tab, Additional Information section.
- Enable Individual Worker View and create a market composite tile on the Individual Worker View page.

Line managers and administrators can view market composites in multiple ways.

Role	Location
Line Manager	Market Composites Region in the Compensation Info page, This is accessible via the Compensation Info quick action in the My Team tab.
Line Manager or Compensation Manager	Market Composites dialog box on the Workforce Compensation Worksheet Individual Worker View page on the Workforce Compensation Worksheet
Compensation Manager	Administer Workers page, Compensation tab in the Compensation work area
Compensation Analyst	View Market Composites page in the Compensation work area

### Related Topics

- [Overview of Market Data](#)
- [How You Configure Market Composites Display](#)

## How You Configure Market Composites Display

You can select and label market composites for display in the downstream application using the Configure Market Composites Display task.

You can populate all the columns in the composites table, so professional users have access to complete data, while controlling the downstream consumption of specific columns. You select and label market composites for display in the downstream application using the Configure Market Composites Display task.

On the Configure Market Composites Display page, first use the tabs to select the downstream application page. Next, use the add action to include the compensation types and then use the list of values to select the compensation types you want to display. Enter a compensation types display name if you want it to appear with a friendly label. Additionally,

enable the Market Target as desired. You can also enter a market target display name if you want it to appear with a different label. You define the market targets within the compensation types task.

After you save, you can click the compensation types name link to go to the Configure Composite Columns subtask where you enable the percentiles that you want to appear. You can also enable the chart and select various other columns.

#### *Related Topics*

- [Options to View Market Composites in Compensation](#)
- [Compensation Types for Market Data](#)

# 10 Payroll Elements and Compensation

## How Compensation Uses Payroll Elements

Oracle Fusion Global Human Resources, Oracle Fusion Cloud Compensation, and Oracle Fusion Cloud Total Compensation Statement record compensation. They then transfer the compensation to payroll providers, and store custom data at the worker level using payroll elements.

People then link these elements to salary bases, individual and workforce compensation plans, and total compensation statements.

Compensation Object	Element Use
Salary basis	Create element entries that pass salary amounts to payroll.
Individual compensation plan option	Record allocation amounts using the element input values. The element can also decide costing.  Create element entries that pass stock grant dates and numbers of shares granted. You can also post stock awards directly to the compensation stock table. Use the Stock Grants task, the integrated workbook, HCM Data Loader, or HCM Spreadsheet Data Loader.
Nonsalary workforce compensation component	Create element entries that the Transfer Workforce Compensation Data to HR process uses to pass the component amount, including lump sums. The process also uses them to pass stock grant dates and numbers of shares granted.  You can also post stock awards directly to the compensation stock table. Use the Stock Grants task, the integrated workbook, HCM Data Loader, or HCM Spreadsheet Data Loader.
Total compensation statement	A source of the actual compensation shown for the mapped compensation items.

To hold worker-level data referenced or used in a calculation during a workforce compensation cycle, you can create an information element with multiple input values. Then people configuring workforce compensation plans can use a fast formula to display the element entry values in appropriate worksheet columns.

## Before You Can Use Payroll Elements in Compensation

Whether you've Oracle Fusion Cloud Global Payroll Interface or Oracle Fusion Cloud Global Payroll, you must define payroll statutory units to use in Oracle Fusion Cloud Compensation. You must also associate a legislative data group with each unit.

Do this using the Manage Legal Entities and Manage Legal Entity HCM Information tasks. It ensures that when you hire people, payroll relationships get created automatically. People need these payroll relationships to get their compensation element entries created.

## Payroll Definitions

The payroll definition supplies each person's pay period frequency and end dates. Even if you use a third-party payroll provider, you need to define a payroll if any of these conditions apply:

- You want to use nonrecurring elements.
  - **Note:** We recommend that you assign payrolls to everyone, even when using only recurring elements.
- You want to create a salary basis that uses a frequency of Payroll period.
- You're implementing total compensation statements and these conditions apply:
  - You use recurring elements and want total compensation statements to prorate salary element entries when someone gets hired during a payroll period. You also want the proration to happen when someone's employment is terminated during a payroll period.
  - You want to let individuals view their total compensation statement details to see payroll period amounts.
- You license Oracle Global Payroll Interface.

You don't need to define payroll definitions when both of these conditions apply:

- You use only recurring elements defined at the assignment level.
- You store salary at the assignment level of a legal employer.

But if you use compensation history, all compensation awards appear in the recurring payment sections as end-of-year amounts.

## Consolidation Groups

If you create payroll definitions, you need to also define consolidation groups. Each legislative data group that you define elements for needs to have at least one consolidation group.

## Define Elements, Balances, and Formulas

The Define Elements, Balances, and Formulas task list contains the tasks required for creating payroll elements for compensation, absences, time and labor, and HR management.

You can also 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 other tasks required to set up payroll processing.

## Required Tasks

Your business requirements and product usage decide which required tasks you need to complete. The required tasks include:

- Elements

- Payroll Definitions, which is usually required to support elements
- 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 might need to create element subclassifications, balances, organization payment methods, and object groups. See the Global Payroll Interface documentation for more information.

## Before You Begin

Before you start the Define Elements, Balances, and Formulas task list, complete the tasks these offerings contain.

Task	Use To	Why It's Important
Manage Legal Entities	Create payroll statutory units.	Ensures that hiring employees automatically creates payroll relationship records.
Manage Legal Entity HCM Information	Associate a legislative data group with each payroll statutory unit.	Ensures that hiring employees automatically creates payroll relationship records.
Manage Features by Country or Territory	Select Payroll Interface as the extension for any countries or territories where you extract HR data to send to a third-party payroll provider.	Ensures that you use the appropriate element templates to create earnings.

## 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.

## Elements

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

Source Application	Element Purpose
Compensation	<ul style="list-style-type: none"><li>• Earnings and deduction elements, such as bonuses, overtime earnings, and voluntary deductions.</li><li>• Information elements to load user-defined data to use during a workforce compensation cycle.</li></ul>
Benefits	<ul style="list-style-type: none"><li>• Deduction elements to record activity rate calculation results, such as:</li></ul>

Source Application	Element Purpose
	<ul style="list-style-type: none"><li>Employee contributions and employer distributions for medical options</li><li>Flex credits for flex benefits</li><li>Earnings elements to disburse unused credits as cash.</li></ul>
Time and Labor	Time card details such as salary, overtime hours, and shift unit payments.
Absence Management	Absence details such as number of hours, days absent, or accrual absence balance details.

## Payroll Definitions

The payroll definition supplies the payroll period frequency and dates, which some applications use for payroll calculations. A payroll is assigned to the assignment record of an employee, it indicates the payroll frequency for the assignment such as weekly. This table shows which applications require payroll definitions.

Application	Payroll Definition Required?	Usage Conditions
Global Payroll Interface	Yes, optional	Required if you run the Calculate Gross Earnings process
Compensation	Yes, optional	Required if you capture salary with a frequency of payroll period
Benefits	Optional	Required to use the payroll period frequency to calculate communicated rates or values passed to payroll.
Time and Labor	Optional	N/A
Absence Management	Optional	N/A

## 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 from My Client Groups.

Task	Requirements
Organization Payment Methods	To record personal payment methods for your employees, you need to 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.
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.
Fast Formulas	The Elements task provides predefined payroll formulas for payroll interface users. You can also write formulas for several uses, including:

Task	Requirements
	<ul style="list-style-type: none"><li>Validating user entries into element input values</li><li>Configuring compensation, benefit, and accrual plan rules</li><li>Calculating periodic values for gross earnings and defining element skip rules for the Calculate Gross Earnings process (provided with Global Payroll Interface)</li></ul>
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 might want to create other balances for extracts or reporting.
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 Definitions](#)
- [Payroll Balance Definitions](#)
- [How Payroll Elements Hold Information for Multiple Features](#)

## Create a Payroll Element to Use with Salary Bases

Configure the payroll element for use in recurring base pay, such as annual salaries and hourly earnings. This guidance applies to US legislative data groups (LDG).

You can use the same payroll element with multiple salary bases if they've the same currency. You can't use the same element for salary bases, individual compensation plans, and workforce compensation plans, or a combination.

- On the **My Client Groups > Compensation** page, click **Elements**.
- On the Elements page, click the **Create** icon.
- On the Create Element dialog box, complete these steps:
  - Select a US LDG.
  - Select the primary classification, such as Standard Earnings. The listed classifications depend on the LDG that you selected.
  - Optionally select the secondary classification, such as Regular. When the selections don't really match your purpose, you can skip this step.
  - Select the appropriate category, if required, such as Standard.
  - Click **Continue**.
- On the Create Element: Basic Information page, complete these steps:
  - Enter a descriptive name that lets you and others easily figure out the use or purpose of the element. Make sure that the name starts with a letter and contains only letters, numbers, spaces, hyphens, or a combination of these. It can't contain any special characters.

You can include a prefix, such as SB that lets people easily identify that the element is for a salary basis. You don't want people using the same element in different compensation objects because it can lead to payroll

conflicts. It can also lead to unexpected deletions of salary or individual compensation. Two example names are SB US Annual Salary and SB California Hourly Wages.

- b. Complete these basic information fields.

Field	Value Guidance
Reporting Name	<p>Enter the name that you want to show in compensation history, on reports, and on payslips for this earnings payroll element.</p> <p>Reporting names need to be unique for elements that you add to compensation history.</p>
Effective Date	<p>Enter 1/1/1951.</p> <p>Enter an early date so that the element is available for use immediately in your salary bases, and individual and workforce compensation plans.</p>
Currency	<p>Select US Dollar.</p> <p>Decides each individual's local salary currency.</p>
What is the earliest entry date for this element?	Select First Standard Earning Date.
What is the latest entry date for this element?	This date decides how element entries process after someone's job is terminated or they're transferred to another payroll. Select the value that fits your business process.
At which employment level should this element be attached?	<p>Select Assignment.</p> <p>Term-level elements aren't supported.</p>

- c. Specify that this element recurs each payroll period.
  - d. Specify whether a person can have more than one entry for this element in a payroll period. To let people link the same salary element to multiple salary bases, select **Yes**.
  - e. To accept the remaining default values, click **Next**.
5. If your implementation includes it, on the Create Element: Additional Details page, complete these steps:
    - a. Select the calculation rule, such as Flat amount.
    - b. Select the default periodicity, which is the frequency that the salary basis stores the amount in. The value should be the same as the salary basis frequency, such as Hourly, Weekly, or Monthly.
    - c. Select the conversion rule for the element. For the calculation used by each conversion rule, see [Conversion Rule Options for Configuring Additional Details of Payroll Elements](#).
    - d. To accept the default values for the remaining rules, click **Next**.

If you use Global Payroll or Global Payroll Interface, configure more details for base pay elements, such as proration and retroactive changes.



6. On the Create Element: Review page, complete these steps:
  - a. Review all your rules and options to ensure that every value is correct.
  - b. To create the element, click **Submit**.
7. On the Element Summary page, complete these steps:
  - a. Review the generated input values. To link the element to a salary basis, the element needs to have a monetary input value and the Periodicity input value.
    - If your implementation includes Global Payroll, you can use the automatically created Amount input value as is with no extra configuration. If Amount wasn't automatically created, you need to create a monetary input value so that people can link the element to a salary basis.
    - If the primary classification is Standard Earnings, the Periodicity input value was automatically created. If the primary classification is Information, you need to create it.
  - b. Make the element eligible for everyone to use. The element will apply only to people assigned the salary basis linked to this payroll element.
    - i. In the Elements Overview section, select **Element Eligibility**.
    - ii. On the Actions menu, select **Create Element Eligibility**.
    - iii. In the General Information section, Element Eligibility Name field, enter the element name with the suffix Open. For example, for the SB US Annual Salary payroll element, the element eligibility name would be SB US Annual Salary Open.
    - iv. Enter the same effective date for element eligibility that you did for the element effective date, such as 1/1/1951.
    - v. To prevent the creation of duplicate element entries when creating or loading salary, make sure that the Automatic entry option is clear.
  - c. Click **Submit**.
  - d. Click **Done**.

#### Related Topics

- [How Element Classification Components Work Together](#)
- [Payroll Element Eligibility](#)
- [Options to Determine an Element's Latest Entry Date](#)
- [Periodicity Conversion](#)
- [How Payroll Elements Hold Information for Multiple Features](#)

## Create a Payroll Element to Use with Individual Compensation Plans

Configure the payroll element for use in recurring or nonrecurring individual compensation allocations, voluntary contributions, and nonmonetary information. For example, use it for allowances, spot bonuses, stock grants, retirement savings plans, charitable donations, and storage of duration or points information.

You can use a payroll element in only one option of one individual compensation plan. And you need to use different elements for salary bases and individual compensation plans.

This guidance applies to US legislative data groups (LDG).

1. On the **My Client Groups > Compensation** page, click **Elements**.
2. On the Elements page, click the **Create** icon.
3. On the Create Element dialog box, complete these steps:
  - a. Select a US LDG.
  - b. Select the primary classification. The listed classifications depend on the LDG that you selected.

Element Use	Suggested Primary Classification
Recurring plan payments	Standard Earnings
Nonrecurring plan payments for bonus or lump sum elements	Supplemental Earnings
Recurring and nonrecurring voluntary deductions for individuals' savings contributions and charitable deductions	Voluntary Deductions or Pretax Deductions
Stock grants and awards	Information
Storing nonmonetary information	

- c. Optionally select the secondary classification. When the selections don't really match your purpose, you can skip this step.

Element Use	Suggested Secondary Classification
Recurring plan payments	Regular Not Worked
Nonrecurring plan payments	Awards and Prizes, Bonus, another relevant option, or leave it blank.
Recurring and nonrecurring voluntary deductions	Select the relevant option. Otherwise, leave it blank.
Stock grants	Leave it blank.
Storing nonmonetary information	

- d. Select the appropriate category, if required, such as Standard.
  - e. Click **Continue**.
4. On the Create Element: Basic Information page, complete these steps:
    - a. Enter a descriptive name that lets you and others easily figure out the use or purpose of the element. Make sure that the name starts with a letter and contains only letters, numbers, spaces, hyphens, or a combination of these. It can't contain any special characters.

You can include a prefix, such as IC that lets people easily identify that the element is for an individual compensation plan. You don't want people using the same element in different compensation objects because it can lead to payroll conflicts. It can also lead to unexpected deletions of salary or individual

compensation. Example names are IC Gym Allowance, IC Car Allowance, IC Quarterly US Sales Award, IC New Hire Stock Grant, and IC Red Cross Contribution.

**b.** Complete these basic information fields.

Field	Value Guidance
Reporting Name	Enter the name that you want to show in compensation history, on reports, and on payslips for this earnings payroll element.  Reporting names need to be unique for elements that you add to compensation history.
Effective Date	Enter 1/1/1951.  Enter an early date so that the element is available for use immediately in your salary bases, and individual and workforce compensation plans.
Currency	Select US Dollar.  Identifies the currency of the entered and displayed allocation, deduction, or contribution amount.
What is the earliest entry date for this element?	Select First Standard Earning Date.
What is the latest entry date for this element?	This date decides how element entries process after someone's job is terminated or they're transferred to another payroll. Select the value that fits your business process.
At which employment level should this element be attached?	Select Assignment.  Relationship-level and term-level elements aren't supported.

- c.** Specify whether this element recurs each payroll period or requires an explicit (nonrecurring) entry, such as a bonus, stock grant, or onetime charitable donation.
- d.** Specify whether a person can have more than one entry for this element in a payroll period. To let people link the same element to multiple individual compensation plans, select **Yes**.
- e.** To accept the remaining default values, click **Next**.

For Information elements, skip to the Double-Check Your Selections and Submit the Element section by clicking **Next** again.

5. If your implementation includes it, on the Create Element: Additional Details page, complete these steps:
  - a. Select the calculation rule. For recurring and nonrecurring plan payments and nonrecurring voluntary deductions, select **Flat amount**. For recurring voluntary deductions, select **Flat amount** or **Percentage of Earnings**.
  - b. Select the default periodicity, which is the frequency that the plan stores the amount in.

Element Use	Value Guidance
Recurring plan payments	The typical value is Monthly.
Nonrecurring plan payments	Quarterly, Annually, or Periodically
Nonrecurring voluntary deductions	
Recurring voluntary deductions	Typically the same periodicity as base pay, such as Annually or Monthly

- c. Select the conversion rule for the element. For the calculation used by each conversion rule, see [Conversion Rule Options for Configuring Additional Details of Payroll Elements](#).
  - d. To accept the default values for the remaining rules, click **Next**.
6. On the Create Element: Review page, complete these steps:
  - a. Review all your rules and options to ensure that every value is correct.
  - b. To create the element, click **Submit**.
7. On the Element Summary page, complete these steps:
  - a. Review the generated input values.
    - For the input value that you link to the plan option, make sure that Special Purpose is **Primary input value**. Typically, this is the Amount input value. If the value wasn't automatically created, you can manually add and configure it here. On individual compensation pages and in notifications, the primary input value appears in the Value column. Detail pages show other input values. And notifications can show other input values if the ORA\_CMP\_BIP\_IC\_SHOW\_INPUT\_VALUES profile option is enabled.
    - For each input value that doesn't apply to the plan, deselect the **Displayed** and **Allow User Entry** options, if they aren't already clear.
    - For stock grant information elements, make sure that an input value with the Number unit of measure has Special Purpose set to **Primary Input Value**. The element date feeds the Grant Date column of the stock history table and the primary input value feeds the Shares Granted column. The Shares section of people's Compensation page uses these values. Depending on configurations, people's total compensation statements can also use them.
    - For storage of nonmonetary information, make sure that Primary Input Value doesn't have **Money** as the unit of measure.
  - b. To validate input values entered on individual compensation pages, add the relevant validation fast formula. For example, add a validation formula to enforce length of service requirements. A recipient's service must be more than 10 years to get a proposed award of 1,000 USD or more. The proposed allocation for anyone with shorter service must be less.

- c. 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

Setup steps:

- i. In the Element Overview, Input Values section, select **Amount**.
- ii. In the Input Values section, on the Edit menu, select **Correct**.
- iii. In the Default Entry Values and Validation section, enter a minimum or maximum value, or both.
- iv. Select **Warning** or **Error**, as appropriate.
  - o **Warning:** Show a message when the manager or HR specialist enters an amount that's below the minimum value or above the maximum value, if set. This usage enables them to still continue with their submissions.
  - o **Error:** Show a message when someone enters an amount that's 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.
- d. Make the element eligible for everyone to use. The element will apply only to people assigned the salary basis linked to this payroll element.
  - i. In the Elements Overview section, select **Element Eligibility**.
  - ii. On the Actions menu, select **Create Element Eligibility**.
  - iii. In the General Information section, Element Eligibility Name field, enter the element name with the suffix Open. For example, for the IC Gym Allowance payroll element, the element eligibility name would be IC Gym Allowance Open.
- e. Click **Submit**.
- f. Click **Done**.

#### Related Topics

- [How Element Classification Components Work Together](#)
- [Payroll Element Eligibility](#)
- [Options to Determine an Element's Latest Entry Date](#)
- [Periodicity Conversion](#)
- [How Payroll Elements Hold Information for Multiple Features](#)

## Create a Payroll Element to Use with Workforce Compensation Plans

Configure the payroll element for use in recurring or nonrecurring workforce compensation allocations and nonmonetary information. For example, use it for allowances, spot bonuses, and stock grants. Also use it to store duration or points information and custom worker data.

This guidance applies to US legislative data groups (LDG).

You can use the same payroll element with multiple workforce compensation plans if they have the same currency. You can't use the same element for different components in a workforce compensation plan. You also can't use the same element for salary bases, individual compensation plans, and workforce compensation plans, or a combination.

1. On the **My Client Groups > Compensation** page, click **Elements**.
2. On the Elements page, click the **Create** icon.
3. On the Create Element dialog box, complete these steps:
  - a. Select a US LDG.
  - b. Select the primary classification. The listed classifications depend on the LDG that you selected.

Element Use	Suggested Primary Classification
Recurring plan payments	Standard Earnings
Nonrecurring plan payments for bonus or lump sum elements	Supplemental Earnings
Stock grants and awards	Information
Storing nonmonetary information	

- c. Optionally select the secondary classification. When the selections don't really match your purpose, you can skip this step.

Element Use	Suggested Secondary Classification
Recurring plan payments	Regular Not Worked
Nonrecurring plan payments	Awards and Prizes, Bonus, another relevant option, or leave it blank.
Stock grants	Leave it blank.
Storing nonmonetary information	

- d. Select the appropriate category, if required, such as Standard.
    - e. Click **Continue**.
4. On the Create Element: Basic Information page, complete these steps:
  - a. Enter a descriptive name that lets you and others easily figure out the use or purpose of the element. Make sure that the name starts with a letter and contains only letters, numbers, spaces, hyphens, or a combination of these. It can't contain any special characters.

You can include a prefix, such as WFC that lets people easily identify that the element is for a workforce compensation plan. You don't want people using the same element in different compensation objects

because it can lead to payroll conflicts. It can also lead to unexpected deletions of salary or compensation. Example names are WFC Gym Allowance, WFCC Car Allowance, and WFC Quarterly US Sales Award.

- b. Complete these basic information fields.

Field	Value Guidance
Reporting Name	<p>Enter the name that you want to show in compensation history, on reports, and on payslips for this earnings payroll element.</p> <p>Reporting names need to be unique for elements that you add to compensation history.</p>
Effective Date	<p>Enter 1/1/1951.</p> <p>Enter an early date so that the element is available for use immediately in your salary bases, and individual and workforce compensation plans.</p>
Currency	<p>Select US Dollar.</p> <p>Workforce compensation components with a local currency determination code of Salary Basis Currency use the currency of the element linked to the individual's salary basis.</p>
What is the earliest entry date for this element?	Select First Standard Earning Date.
What is the latest entry date for this element?	This date determines how element entries process after someone's job is terminated or they're transferred to another payroll. Select the value that fits your business process.
At which employment level should this element be attached?	Select Assignment or Term.

- c. Specify whether this element recurs each payroll period or requires an explicit (nonrecurring) entry, such as a bonus or stock grant.
- d. Specify whether a person can have more than one entry for this element in a payroll period. To let people link the same element to multiple workforce compensation plans, select **Yes**.
- e. To accept the remaining default values, click **Next**.

For Information elements, skip to the Double-Check Your Selections and Submit the Element section by clicking **Next** again.

5. If your implementation includes it, on the Create Element: Additional Details page, complete these steps:
  - a. For the calculation rule, select **Flat amount**.
  - b. Select the default periodicity, which is the frequency that the plan stores the amount in.

Element Use	Value Guidance
Recurring plan payments	The typical value is Monthly.

Element Use	Value Guidance
Nonrecurring plan payments	Quarterly, Annually, or Periodically

- c. Select the conversion rule for the element. For the calculation used by each conversion rule, see [Conversion Rule Options for Configuring Additional Details of Payroll Elements](#).
  - d. To accept the default values for the remaining rules, click **Next**.
6. On the Create Element: Review page, complete these steps:
- a. Review all of your rules and options to ensure that every value is correct.
  - b. To create the element, click **Submit**.
7. On the Element Summary page, complete these steps:
- a. Review the generated input values.
    - For the input value that you link to the compensation component, make sure that Special Purpose is **Primary input value**. Typically, this is the Amount input value. If the value wasn't automatically created, you can manually add and configure it here.
    - For each input value that doesn't apply to the plan, deselect the **Displayed** and **Allow User Entry** options, if they aren't already clear.
    - For stock grant information elements, make sure that an input value with the Number unit of measure has Special Purpose set to **Primary Input Value**. The element date feeds the Grant Date column of the stock history table and the primary input value feeds the Shares Granted column. The Shares section of people's Compensation page uses these values. Depending on configurations, people's total compensation statements can also use them.
    - For storage of nonmonetary information, make sure that Primary Input Value doesn't have **Money** as the unit of measure.
  - b. Make the element eligible for everyone to use. The element will apply only to people assigned the salary basis linked to this payroll element.
    - i. In the Elements Overview section, select **Element Eligibility**.
    - ii. On the Actions menu, select **Create Element Eligibility**.
    - iii. In the General Information section, Element Eligibility Name field, enter the element name with the suffix Open. For example, for the WFC Gym Allowance payroll element, the element eligibility name would be WFC Gym Allowance Open.
  - c. Click **Submit**.
  - d. Click **Done**.

#### Related Topics

- [How Element Classification Components Work Together](#)
- [Payroll Element Eligibility](#)
- [Options to Determine an Element's Latest Entry Date](#)
- [Periodicity Conversion](#)
- [How Payroll Elements Hold Information for Multiple Features](#)



# Conversion Rule Options for Configuring Additional Details of Payroll Elements

Use this information to help you select the correct conversion rule when you're configuring the additional details for payroll elements linked to compensation objects.

Conversion Rule	Calculation	Example
Standard Rate Annualized	<ol style="list-style-type: none"> <li>1. Convert the source amount and periodicity to an annual value using default values of 2080 hours, 260 working days.</li> <li>2. Convert the amount to the required periodicity and rate.</li> </ol>	NA
Standard Rate Daily	<ol style="list-style-type: none"> <li>1. Calculate a daily rate using default value 260 working days.</li> <li>2. Convert the amount to the required output periodicity and rate.</li> </ol>	NA
Standard Working Hours Rate Annualized	<ol style="list-style-type: none"> <li>1. Convert the source amount and working hours to an annual value. Use the person's standard working hours.</li> <li>2. Calculate the rate.</li> </ol>	<p>Scenario: The person works 40 hours a week with a monthly salary of 1000 US dollars.</p> <p>Calculation: <math>((1000 \times 12) / (40.00 \times 52)) = 5.77</math> an hour</p>
Assignment Working Hours Rate Annualized	<ol style="list-style-type: none"> <li>1. Convert the source amount and working hours to an annual value. Use the person's working hours.</li> <li>2. Calculate the rate.</li> </ol>	<p>Scenario: The person works 40 hours a week, with a 37.5 standard working hours a week, and a monthly salary of 1000 US dollars.</p> <p>Calculation: <math>((1000 \times 12) / (37.50 \times 52)) = 6.15</math> an hour</p>
Periodic Work Schedule Rate Annualized	<ol style="list-style-type: none"> <li>1. Convert the monetary value and work schedule to an annual value. Use the person's work schedule for the payroll period for daily and hourly conversions.</li> <li>2. Calculate the rate.</li> </ol>	<p>Scenario for a person assigned a monthly payroll:</p> <ul style="list-style-type: none"> <li>• The person has a monthly salary of 1000 US dollars.</li> <li>• The formula checks the work schedule details for the month.</li> </ul> <p>Daily conversion calculation: <math>1000 \text{ a month} / 20 \text{ days in the month} = 50</math></p> <p>For a person not assigned a payroll: The calculation uses the weekly rate and converts the result to an annual amount. The calculation then divides the annual amount by the number of days or hours in that week, according to the work schedule.</p>



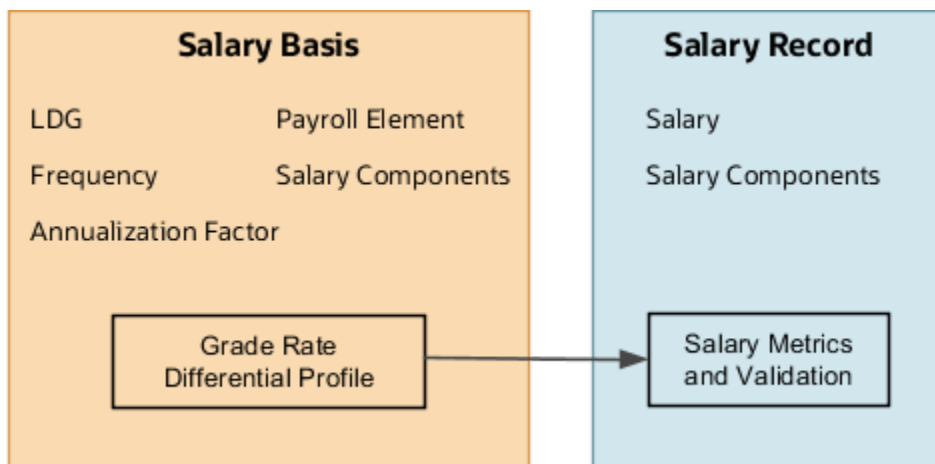
# 11 Base Pay Overview

## Overview of Base Pay Configuration

Base pay is a person's salary amount. Managers and HR specialists view and adjust this amount or any component amounts or percentages over the time someone works in their organization. Each salary record they manage has an associated salary basis.

Here's how the salary basis configuration works with salary records and payroll processing.

- Calculations use the frequency and annualization factor of the salary basis to decide the annualized salary that appears on the salary record. Calculations also use these salary basis settings and the full-time equivalent value from the employment record to decide the annualized full-time salary.
- The salary record uses any salary components configured on the salary basis to itemize salary adjustments for reports, such as merit and location.
- The payroll element associated with the salary basis holds the salary amount entered on the salary record. The basis passes that amount to payroll for processing.
- The grade rate and differential profile associated with the salary basis decide the salary metrics and validation messages people see on the salary record. Associating them with the salary basis is optional, so they aren't part of every salary basis configuration.



You configure grades, grade rates, progression grade ladders, rate definitions, and payroll elements using the Base Pay task list in the Compensation work area. You can also manage lookups, actions, and action reasons.

### Related Topics

- [How You Enable Salary Itemization Using Incremental Components](#)
- [How You Store the Salary Amount and Pass It to Payroll for Processing](#)
- [How Salary Metrics Are Calculated](#)

# How Salary Basis Options Work with Salary Amounts and Calculations

The interval used to quote and store salary, such as hourly or annually, is the frequency of the salary basis associated with the salary record.

The annualization factor is the numeric multiplier for the frequency. Calculations use the factor and the salary amount to decide the annual salary amount, as these examples show.

Frequency	Annualization Factor	Salary (USD)	Annual Salary (USD)
Annually	1	50,000	50,000
Monthly	12	10,000	120,000
Hourly	2080	100	208,000

## Related Topics

- [Overview of Base Pay Configuration](#)
- [Examples of Annual Salary and Annualized Full-Time Salary Calculations](#)
- [How You Change a Salary to Account for a Changed FTE](#)

# How You Store the Salary Amount and Pass It to Payroll for Processing

The salary basis holds the overall salary amount from the salary record. It passes the amount to the element entry for payroll processing each pay period.

## Legislative Data Group (LDG)

You configure each salary basis for a specified LDG. If your organization has multiple LDGs, you need to create a uniquely named salary basis for each unique set of characteristics applicable to each LDG. The LDG limits the payroll elements that you can associate with the salary basis.

## Payroll Element

You attach a single payroll element to each salary basis to hold the overall salary amount. The elements that you can select from meet these criteria:

- They're valid for the selected LDG.
- They recur.

- They're either Earning or Information elements.
- They include eligibility definitions.

The required element eligibility definition can include eligibility criteria. We recommend that you leave the eligibility open on the payroll element.

Make sure that individual compensation doesn't also use the element you select. Using the same element across compensation objects can lead to payroll conflicts. It can also lead to unexpected deletions of salary or individual compensation.

## Restrictions

You can link recurring elements to multiple salary bases only if they meet these conditions:

- Headquarters-based grades have a base pay of X.
- Grades for all other locations have a base pay of X - 2%.

## Input Value

An element can have multiple input values. The element input value that you select in the salary basis, such as **Amount**, is the value that stores the salary amount.

The monetary amount stored in the element entry is the salary amount in the salary information for the person's assignment. That salary amount is in the frequency of the person's salary basis, such as annually or hourly.

If you don't use Oracle Fusion Global Payroll, you can store the salary amount using information payroll elements.

- If the element includes the **Periodicity** input value, the element entry stores the annual salary amount.
- If the element doesn't include the **Periodicity** input value, the element entry stores the salary amount in the same frequency as the salary basis.

Here's how the payroll formula processes the input values of element entries received in the frequency of the salary basis:

Salary Basis Frequency	Amount Passed to Payroll	Payroll Processing
Annually	Annual amount	Converts the annual amount to the appropriate payroll period amount.
Hourly	Hourly rate	Multiplies the hourly rate by the number of hours reported for the payroll period.

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

## Currency

The element currency automatically decides the salary basis currency used to pay the person.

## Reference

The Configuring Payroll Elements for Use in Oracle Fusion Compensation document (ID [1589502.1](#)) explains how compensation uses payroll elements. It also explains how to configure the elements for specific uses.

#### Related Topics

- [Overview of Base Pay Configuration](#)
- [Create a Payroll Element to Use with Salary Bases](#)

## How Many Salary Bases to Create

You need to create a separate salary basis, for each unique combination of the following characteristics associated with a worker's base pay.

A good practice if you require many salary bases in your organization is to use descriptive names. Examples are CA Hourly Wages, UK Annual Salary with Components, and Adjunct Pay 3 Credit Courses.

### Legislative Data Group (LDG)

How many 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 and Annualization Factor

How many different frequencies for quoting base pay are in use? People with multiple assignments on different payroll frequencies need to have a different salary basis associated with each assignment.

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

### Payroll Element and Currency

Do you want to use the same payroll element for different salary bases? You can do this if the element has these configurations:

- It's a recurring earnings element.
- It allows multiple entries in the same period.

How many currencies do you pay people in, within a single LDG? You need one payroll element for each currency within an LDG. You also need a separate salary basis for each payroll element.

### Components

Do you want to itemize salary? You need one extra salary basis for each unique collection of components.

### Grade Rates and Differential Profiles

How many grade rates are you using? The number of salary bases increases by one for each grade rate in use. You can reduce the number of grade rates by using a differential profile. Profiles with the compensation zone or compensation zone and business unit criteria can have grade rates configured instead of multipliers. The number of salary bases increases by one for each differential profile in use.

## Rounding Rules and Decimal Precision

How many different rounding rules do you use for salary amount? The number of salary bases increases by one for each rounding rule in use.

How many different decimal places do you display? The number of salary bases increases by one for each decimal precision in use.

### Related Topics

- [Incremental Salary Component Lookups](#)
- [How Salary Basis Options Work with Salary Amounts and Calculations](#)
- [Create a Payroll Element to Use with Salary Bases](#)
- [Grade Rates](#)

## How You Can Audit Salary Data

You need to enable audit for salary data using the Manage Audit Policies task.

## Document Records for Salary

Proposers can attach document records while submitting salary proposals using responsive Change Salary and Salary History actions. Approvers can view the attachments while deciding to approve or reject the proposal.

After approval, the attachments are available in the individual's document records. People can also see the attached document records on the My Compensation and Compensation Info salary details pages.

Proposers can include document records of both Person and Assignment types. And actions tag document records with the action occurrence identifier. Here's what happens to salary and the document record during certain scenarios, and depending on your setup:

Scenario	What Happens
During global transfer that copies salary	<ul style="list-style-type: none"><li>• The Global Transfer action copies salary to the destination legal employer.</li><li>• The action moves the assignment-level document record. But it doesn't link the document to the copied salary.</li></ul>
When someone uses Change Salary to correct a salary created with HR actions, such as Hire, Promote, and Local and Global Transfer	<ul style="list-style-type: none"><li>• The action creates an action occurrence.</li><li>• The document of record created with the original transaction isn't visible.</li></ul>
When someone uses Change Salary to correct a salary created with compensation actions, such as Change Salary or Salary History	<ul style="list-style-type: none"><li>• The process doesn't create an action occurrence.</li><li>• The document of record created with the original transaction is visible.</li></ul>

Scenario	What Happens
When you've Reuse Action Occurrence Identifier enabled	<ul style="list-style-type: none"> <li>• Actions reuse the action occurrence when the effective date, action, and reason match that of the assignment. The document of record created with the original transaction is visible and people can't delete it.</li> <li>• Actions create an action occurrence when the effective date, action, and reason are different. The document of record created with the original transaction isn't visible.</li> </ul>
When you've Combined Correction and Deletion for Assignment, Salary, and Document Records on View Employment Details Page enabled	<ul style="list-style-type: none"> <li>• Actions overwrite the action occurrence with the value selected by the proposer in the action. If the proposer's selection is different from that of the salary, then the document of record attached to the salary isn't visible.</li> </ul>

## Let Proposers Include Document Records in Salary Proposals

Make the Document Records section visible so that proposers can include documents in their salary proposals. And optionally filter the types of documents that they can include by action.

1. Make the Document Records section visible in these Transaction Design Studio rules:
  - Change Salary
  - Salary History
  - My Compensation
  - Compensation Info
2. Optionally, filter the document types by action. If you don't do this filtering, proposers can add all document types allowed by their document type security profiles. This filtering applies only when proposers add new document records.
  - a. In the Setup and Maintenance work area, search for and click the **Manage Enterprise HCM Information** task.
  - b. Search for HCM Flow and Document Type Mapping.
  - c. Select the document types for these HCM flows:
    - Change Salary for Line Manager
    - Change Salary for Compensation Manager
    - Salary History



# 12 Salary Basis

## Salary Basis Options for Determining Salary Amount

When you configure a salary basis, you need to specify whether it determines the salary amount by user, by incremental components, or by simple components.

### *Related Topics*

- [Salary Amount Is Determined by User](#)
- [Salary Amount Is Determined by Incremental Components](#)
- [FTE Adjustments When Salary Amount Is Determined by Simple Components](#)

## Salary Amount Is Determined by User

With this type of salary basis, HR specialists or managers enter salary amounts, adjustment amounts, or adjustment percentages when changing salary. You can use this type to determine salary amounts using grade step progression.

### *Related Topics*

- [Basic Process to Default Salary Amounts from Grade Ladder Rates](#)

## Salary Amount Is Determined by Incremental Components

With this type of salary basis, HCM specialists or managers itemize the salary adjustment using incremental components provided by the basis. Or they select the components when changing salary. Which method they use depends on the salary basis configuration.

**CAUTION:** To determine salary amounts using grade step progression, don't select this type of salary basis.

Only the first salary record itemizes the entire salary amount. All later salary records itemize only the adjustment amount, using percentages or amounts.

### Example

On the first salary record, the HR specialist defines a 28,000 USD salary, as shown here.

Component	Amount
Base	20,000
Merit	5,000
Location	3,000

The next year, the manager adjusts that person's salary to 32,000 USD, as shown here.

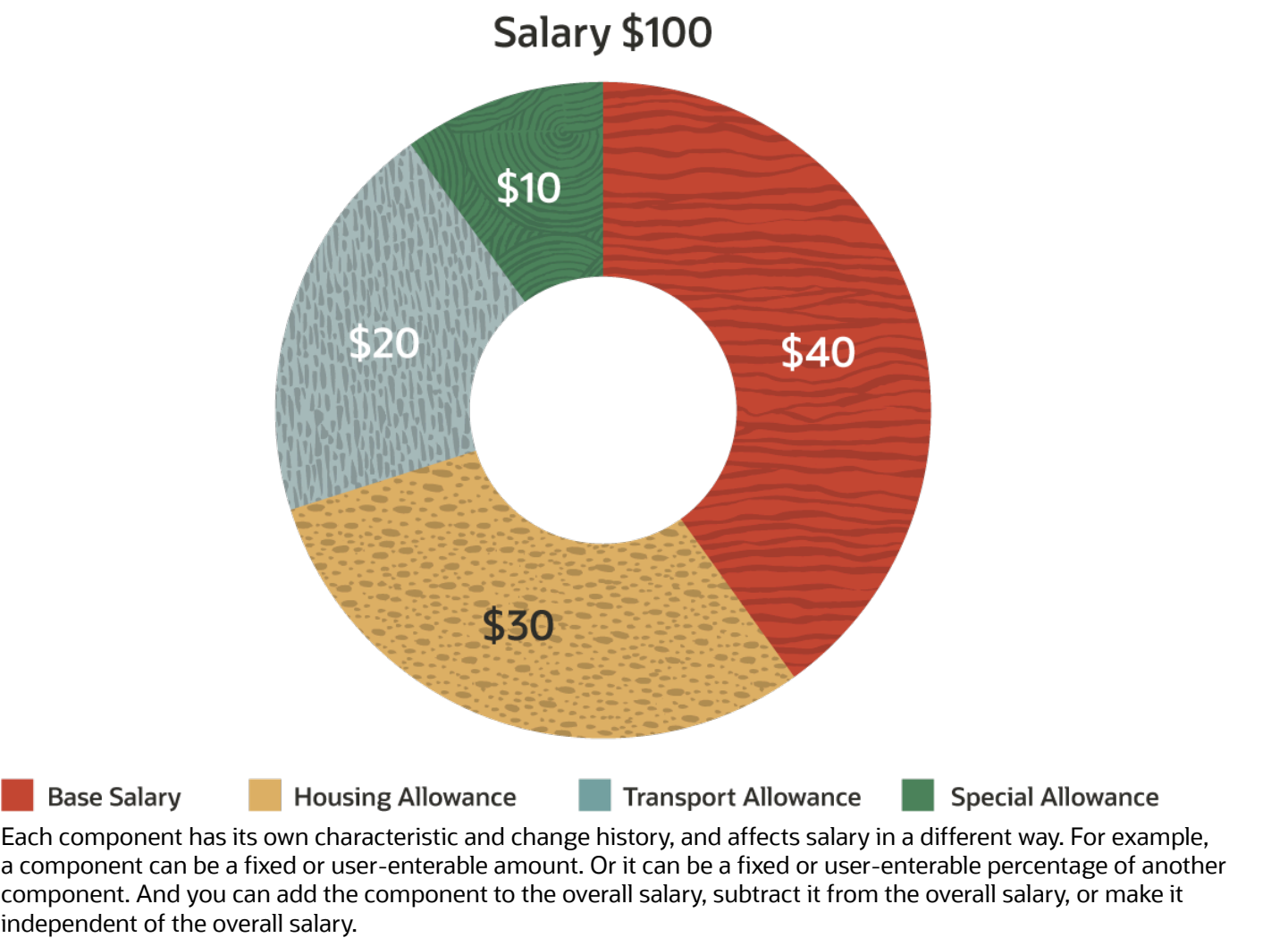
Component	Adjustment Amount	Adjustment Percentage
Base	5,000	18
Merit	0	0
Location	-1,000	-0.04

#### Related Topics

- [Incremental Salary Component Lookups](#)

## Salary Amount Is Determined by Simple Components

With this type of salary basis, HCM specialists or managers itemize salary changes using simple components. For example, this \$100 salary is made up of four itemizations.



**Tip:** You should use the simple components on responsive pages with salary information. Don't use classic pages to create, change, or delete salary that uses simple components. You can use classic pages to view simple component information.

## Example

Here's a person's initial salary determined by three simple components and how their manager uses theses components to adjust their salary a year later. On their first salary record, the HCM specialist defines their 25,000 USD salary, as shown here.

Component	Amount
Base	20,000
Merit	5,000
Location	3,000

The next year, their manager adjusts their salary to 32,000 USD, as shown here.

Component	Amount	Adjustment Amount	Adjustment Percentage	Prior Value
Base	25,000	5,000	25	20,000
Merit	5,000	0	0	5,000
Location	2,000	-1,000	-33.33	3,000

#### Related Topics

- [Simple Salary Component Lookups](#)
- [Example Simple Component Configurations with People Entering Values and Fixed Percentages](#)
- [Example Simple Component Configurations with Grade Progression Rate, User Entered Values, and Fixed Percentages](#)

## Simple Component Types

You can include up to six different types of simple components in a salary basis configuration.

Type of Simple Component	Description
User entered amount	The person proposing salary can enter the amount.
User entered percentage	The person proposing salary can enter the percentage, which is then applied to the specified component.
Fixed amount	The amount comes from the salary basis configuration and the person proposing salary can't override it.
Fixed percentage	The percentage comes from the salary basis configuration and the person proposing salary can't override it. The percentage applies to the other, specified component.
Overall salary	The amount is calculated from the other component amounts that are configured to add to or subtract from the overall salary. The person proposing salary can't override the amount.
Progression grade ladder rate	The amount comes from the progression grade ladder configuration. it can be either the grade rate value or grade step rate value. The person proposing salary can overwrite the value.

#### Related Topics

- [Create a Progression Grade Ladder to Default Salary Amounts](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## Optional Simple Components in Salary Bases

People proposing salary add or remove optional simple components in responsive flows using the Choose Components menu. They're included at the end of the salary details table instead of the position specified by the sequence set on the salary basis.

The optional components do appear in the specified sequence when people view salary history.

HCM specialists and line managers all see the same optional components for the salary basis. If you need only HCM specialists to add them, consider adding guidance on pages with salary information that discourages line managers from adding them.

**Tip:** You can't include simple components when you use classic Change Salary pages or Salary sections.

You've three options for the Optional attribute:

Option	Effect on the Simple Component
No	It's required and appears in all salary changes.
Yes, don't carry forward	It's optional and won't ever appear automatically when proposing or creating salary through scheduled processes, HCM Data Loader, and HCM Spreadsheet Data Loader. The person proposing a salary change needs to select the component to include it in their proposal. They need to do this for each salary proposal, even if the current salary includes the optional component.
Yes, carry forward	<p>It's optional and won't automatically appear as a part of the first salary proposal. The person proposing a salary change needs to select the component to include it in their proposal. After they include, it continues to appear in future salary changes.</p> <p>For example, the salary basis has car allowance set as an optional component to carry forward. A line manager adds the car allowance to their worker's salary change. All future salary proposals for that worker continue to include the car allowance component until it's explicitly removed.</p>

## Considerations for Using Salary Bases with Incremental Components versus Simple Components

When you configure salary bases, you can use incremental or simple components to itemize salary adjustments. The incremental and simple components that you can configure come from lookups and their values can be either an amount or a percentage.

Consider these key differences when selecting the salary basis type.

Criteria	Incremental Components	Simple Components
Source of component names	CMP_SALARY_COMPONENTS lookup	ORA_CMP_SIMPLE_SALARY_COMPS lookup

Criteria	Incremental Components	Simple Components
Component types	None	<p>User entered amount</p> <p>User entered percentage</p> <p>Fixed amount</p> <p>Fixed percentage</p> <p>Overall salary</p> <p>Progression grade ladder rate</p>
Input type	A Person can enter an amount or a percentage against the incremental component.	When allowed, a person can enter an amount or a percentage. The percentage applies to the amount of another, specified simple component. A person can also enter the adjustment amount or percentage to apply to the previous simple component value.
Default value	None	<p>You can configure the simple components to use static default values or values provided by progression grade ladder rates.</p> <p>You can even configure the components to use default values calculated by applying percentages to other specific simple components. For example, you can calculate a car or housing allowance as a percentage of a base salary.</p>
Amount or percentage	Can be either	
Adjustment history	The adjustment applies to only the current salary record.	Adjustments apply to the current and future salary records.
	Example scenario: In 2001 the worker gets a merit component of \$100. In 2002, they get a \$10 increase and in 2003, they get a \$15 increase.	
	<p>Results: Their salary history shows the incremental merit component amount of \$100 in 2001. It shows the adjustment amounts of \$10 in 2002 and \$15 in 2003.</p> <p>Their history doesn't show the calculated amount of \$110 in 2002 or \$125 in 2003.</p>	<p>Results: Their salary history for the simple merit component shows the amount of \$100 in 2001, \$110 in 2002, and \$125 in 2003.</p> <p>The history of a simple component is preserved when the salary basis changes and both bases use simple components of the same component type.</p>
Visibility of previous amount	None. People proposing or reviewing proposed salary changes can't see the previous amounts or percentages.	People proposing and reviewing proposed salary changes can see previous amounts or percentages.
Effect of full-time equivalent (FTE)	None	Each value gets adjusted for FTE.
Effect on overall salary	The individual values are added to the previous salary amount to decide the new overall salary.	You can specify whether the individual values add to or subtract from the overall salary amount. You can also configure individual values to be independent of the overall salary.

Criteria	Incremental Components	Simple Components
Required or optional	You can configure a fixed set of incremental components that always show when people propose salary changes. Or, you can let them select the incremental components they want to use in their salary proposal, if any.	You specify whether they're optional. People need to provide values for any required simple components when they propose salary changes. And, they can select the optional components they want to include, if any.

## Grade Step Progression

Consider these key differences when selecting the salary basis type of a salary basis used in grade step progression:

Criteria	Incremental Components	Simple Components
Populate salary from progression grade ladder	No	Yes when the simple component type is Progression grade ladder rate
Grade step progression batch processes	Not available	Available

## Integration

Consider these key integration differences when selecting the salary basis type:

Criteria	Incremental Components	Simple Components
Workforce Compensation	Available	
Total Compensation Statements		
Oracle Transactional Business Intelligence (OTBI) reports	Can include	
Global Payroll	Available	
Supported flows	HR actions, Offers, Change Salary, Salary History	
Approval payload	Attributes available	
Notifications shows component break up	GHR actions, Offers, Change Salary, Salary History	Change Salary, Salary History Also available in GHR data models
HCM Data Loader Salary Basis and Salary Allocation objects	Supported	
HCM Extracts	User entities (UEs) and database item (DBI) groups available	
Global transfer	Supported when you can let HCM specialists and managers select the incremental components to use in their salary proposal, if any	Supported
REST services	Supported	
Download salaries	Supported	Not supported

Criteria	Incremental Components	Simple Components
Database view	CMP_ASG_SALARY_COMPONENTS_V	CMP_ASG_SALARY_SIMPLE_CMPTS_V
Audit	Available	
Autocomplete	There's no new object available to set defaults for either incremental or simple component values. You can default only the salary basis, not other attributes, such as component amounts or percentages.	

#### Related Topics

- [Salary Amount Is Determined by Incremental Components](#)
- [Salary Amount Is Determined by Simple Components](#)

## Example Simple Component Configurations with People Entering Values and Fixed Percentages

Here are two examples of how you can configure simple components for people to enter amounts and percentages to add to the overall salary. You can also include simple components that are fixed percentages and independent of the overall salary.

### Example 1

The first example has three simple components that add to an overall salary component. It also has two fixed percentage components that are independent of the overall salary.

Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Basic salary	User entered amount	NA	Add	NA	100,000
Housing	User entered percentage	NA	Add	50%	50,000
Flexible benefit plan	User entered amount	NA	Add	NA	60,000
Annual gross pay	Overall salary	NA	NA	NA	210,000
Provident fund	Fixed percentage	Basic salary	None	12%	12,000
Gratuity	Fixed percentage	Basic salary	None	4.81%	4,810

### Example 2

The second example also has three simple components that add to an overall salary component. And, it has three fixed percentage components that are independent of the overall salary.



Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Basic salary	User entered amount	NA	Add	NA	100,000
Housing	User entered percentage	NA	Add	40%	40,000
Special allowance	User entered amount	NA	Add	NA	60,000
Annual gross pay	Overall salary	NA	NA	NA	200,000
Provident fund	Fixed percentage	Basic salary	None	12%	12,000
Gratuity	Fixed percentage	Basic salary	None	4.81%	4,810
Variable pay	Fixed percentage	Overall salary	None	20%	40,000

#### Related Topics

- [Salary Amount Is Determined by Simple Components](#)

## Example Simple Component Configurations with Grade Progression Rate, User Entered Values, and Fixed Percentages

Here are two examples of how you can configure simple components that provide salary from rates in progression grade ladders.

You can include simple components for people to enter amounts and percentages that also add to the overall salary. And, you can include simple components that are fixed percentages that add to the overall salary or are independent of it.

### Example 1

The first example has five simple components that add to an overall salary component.

Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Basic salary	Grade progression rate	NA	Add	NA	100,000
Housing	Fixed percentage	NA	Add	50%	50,000
Flexible benefit plan	User entered amount	NA	Add	NA	60,000
Provident fund	Fixed percentage	Basic salary	Add	12%	7,200

Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Gratuity	User entered percentage	Basic salary	Add	5%	5,000
Total cash	Overall salary	NA	NA	NA	222,200

## Example 2

The second example also has five simple components that add to an overall salary component. And, it has a fixed percentage component that's independent of the overall salary.

Component	Type	Component Percentage Applies To	Effect on Overall Salary	Default Value	Example
Basic salary	Grade progression rate	NA	Add	NA	100,000
Housing	Fixed percentage	NA	Add	50%	50,000
Flexible benefit plan	User entered amount	NA	Add	NA	60,000
Provident fund	Fixed percentage	Basic salary	Add	12%	7,200
Gratuity	User entered percentage	Basic salary	Add	5%	5,000
Total cash	Overall salary	NA	NA	NA	222,200
Variable pay	Fixed percentage	Basic salary	None	20%	44,440

### Related Topics

- [Salary Amount Is Determined by Simple Components](#)

## How You Migrate Salary Bases with Simple Components

You can use the standard import and export methods and the .csv or .xml files.

## How You Enable Salary Itemization Using Incremental Components

You can enable itemization that lets HR specialists and managers reflect the different reasons for salary changes, such as merit or location. Use the Salary Basis task in the Compensation work area.

## Incremental Component Configuration

Here are the key settings for the salary basis that let you include salary components for itemization.

Field	Value
Salary Basis Type	Salary adjustment amount is determined by incremental components.
Components to Display When Adjusting Salary	<p>Either of these:</p> <ul style="list-style-type: none"><li>• Select specific incremental components to display during allocation.</li><li>• Enable incremental component selection during allocation.</li></ul>

You add incremental salary components or can change the available components by editing the CMP\_SALARY\_COMPONENTS lookup type. Use the Manage Common Lookups task in the Compensation work area.

## Incremental Component Processing

When values change for incremental salary components, the payroll element associated with the salary basis holds the new salary amount calculated from the component adjustments. Payroll doesn't receive individual component values for processing.

### Example

The person's current salary is 50,000 USD. Their manager enters incremental component adjustment percentages and salary calculations decide the monetary amounts, as shown here. The calculations then sum the monetary amounts and the original salary amount to decide the new salary amount of 60,000 USD. Here's the equation:

$$(5,000 + 3,000 + 2,000 + 50,000)$$

Salary Component	Adjustment Percentage	Calculated USD
Merit	10	5,000
Promotion	6	3,000
Adjustment	4	2,000

#### Related Topics

- [Incremental Salary Component Lookups](#)

## Rounding Rules, Salary Amounts, and Decimal Places to Display

You can specify separate rounding rules for the salary amount, annualized values, and salary ranges on a salary basis. You can also specify the decimal places to show for all numeric salary values that you see on the salary record.

Use the Salary Basis task in the Compensation Management work area.

## Rounding Rules and Usages

Here's how amounts and ranges use each rounding rule.

Rounding Rule	Usage
Salary amount	Used by calculations that include the salary amount, for example: <ul style="list-style-type: none"><li>To increase a salary using a percentage, such as 3.5%</li><li>To convert the salary to a different frequency, such as from monthly to annually</li><li>To prorate the salary based on a specific full-time equivalent, such as from 1 FTE to 0.5 FTE</li></ul> It's also used when calculating simple component amounts from percentages or adjustment percentages. The rounding rule doesn't apply to the overall salary amount because it's a sum of the component amounts.
Annualized values	Specifies how the annual salary and annualized full-time salary amounts appear.
Salary range	Specifies how salary ranges appear and when calculating revised salary ranges, for example: <ul style="list-style-type: none"><li>To convert the salary range from one frequency to another</li><li>To apply salary differentials</li></ul>

The rounding rules always affect amounts and values from when you set them and onward. They don't affect previously calculated amounts and values. Here's how you can ensure consistency across historical and current salary amounts:

1. Create another salary basis with new rules instead of editing an existing salary basis.
2. Update the salary records with this new salary basis from a specific date.

You can use loading tools, such as HCM Data Loader and HCM Spreadsheet Data Loader to make this transition seamless. Be sure to set the old salary basis to **Inactive**. This way it's no longer available for people to add it as part of their salary proposals.

## Rounding Rule Place and Decimal Place to Display

We recommend that you match the decimal place of your salary amount rounding rule with the decimal place to display. Here's what happens when the decimal and rounding rule places don't match.

Mismatch Issue	Example Scenario	Example Results
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 get 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.

Mismatch Issue	Example Scenario	Example Results

Payroll element entries ignore the decimal place to display from the salary basis because the elements always use the decimal place of the currency definition. For example, US currency is defined to 2 decimal places. Even if you set your salary amount display to 4 places, the element entries round the amount to 2 places.

Related Topics

- [Overview of Base Pay Configuration](#)
- [Can HCM Data Loader round salary amounts when it loads salary information?](#)



# 13 Examples of How Simple Components Work

## A New Hire Action with Simple Components

Here's an example of what happens in the salary section of a New Hire action when the selected salary basis type is simple components.

1. You select the Simple Components Salary Basis (all required) salary basis and the required components appear in the table.
2. The Basic salary component lets you enter an amount, such as 40,000.
3. The Housing allowance component lets you enter a percentage, such as 60%. Then it applies the percentage to the Basic salary component amount to calculate the allowance amount, such as 24,000.
4. The Transport allowance component is a fixed amount, such as 1,800, that you can't remove or change.
5. The Special allowance component is a fixed percentage, such as 40% that you can't remove or change. The component applies the percentage to the Basic salary component to calculate the allowance amount.
6. The Overall salary component adds all the other component amounts together to get the overall salary amount, such as 81,800.

2

Salary Details

\*Salary Basis

Simple Components Salary Basis (all mandatory)

Component Name	Percentage	Amount	Annual Amount
Basic salary		40,000.00	40,000.00
Housing allowance (Basic salary)	60.00	24,000.00	24,000.00
Transport allowance		1,800.00	1,800.00
Special allowance (Basic salary)	40.00	16,000.00	16,000.00
Overall salary		81,800.00	81,800.00

\*Salary Amount

81,800.00 USD Annually

Grade Name

ZCMP IC1

Annual Salary

81,800.00 USD (FTE 1)

Compa-Ratio

78.65

Annualized Full-Time Salary

81,800.00 USD

Quartile

Below Range

Proposed Salary

81,800.00 USD Annually

83,200.00

124,800.00

Continue

### Related Topics

- Salary Amount Is Determined by Simple Components

## A Change Salary Action and Simple Components

Here's an example of what happens in the salary section of a Change Salary action when the selected salary basis type is simple components.

- For the Basic salary component, you can enter an adjustment amount, such as 2,000, or a percentage, such as 5%. Then it calculates the adjustment percentage or amount and the proposed component amount, such as 42,000. Or you can directly enter the proposed amount and the component calculates the adjustment amount and percentage.
- For the Housing allowance component, you can enter an adjustment amount, such as 1,620, or percentage, such as 6.75%. Then it calculates the adjustment percentage or amount and the proposed component amount,



such as 25,620. Or you can directly enter the proposed amount and the component calculates the adjustment amount and percentage.

3. The Transport allowance component is a fixed amount, such as 1,800, and you can't remove or change it.
4. For the Special allowance component, the adjusted percentage, such as 5%, is fixed and you can't change it. The component calculates the adjustment amount, such as 800, and the proposed component amount, such as 16,800.
5. The Overall salary component adds all the other component amounts together to get the overall salary amount, such as 86,220.

2 Salary Details

\*Salary Basis

Simple Components Salary Basis (all mandatory)

Component Name	Prior Amount	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Basic salary	40,000.00	2,000.00	5.00		42,000.00	42,000.00
Housing allowance (Basic salary)	24,000.00	1,620.00	6.75	61.00	25,620.00	25,620.00
Transport allowance	1,800.00	0.00	0.00		1,800.00	1,800.00
Special allowance (Basic salary)	16,000.00	800.00	5.00	40.00	16,800.00	16,800.00
Overall salary	81,800.00	4,420.00	5.40		86,220.00	86,220.00

\*Salary Amount

86,220.00 USD Annually

Annualized Full-Time Salary

86,220.00 USD

Adjustment Amount

4,420.00 USD

Adjustment Percentage

5.40 %

Annual Salary

86,220.00 USD (FTE 1)

Current Salary

81,800.00 USD Annually

Proposed Salary

86,220.00 USD Annually

+4,420.00 (+5.40%)

83,200.00

124,800.00

Show Current Salary Details

Continue

### Related Topics

- Salary Amount Is Determined by Simple Components

# The First Allocation and Next-Year Changes with Simple Components

Here's an example where you enter the salary information for a new hire and then change their salary a year later. This salary information includes a salary basis with required simple components.

## New Hire Action

While working through the New Hire action, in the Salary section, you select the Salary Required Components salary basis, which includes required simple components. In the table that appears, you see all the required components and any default values. You also see that you can enter a basic salary amount and adjust the default housing allowance percentage. The travel and city allowance value are fixed, so you can't remove or edit them.

The name of the other component appears below the percentage component name. For example, Housing allowance is calculated as 50% of Basic salary component value. So below Housing allowance you Basic salary as a tip that housing allowance is based on it.

Component Name	Percentage	Amount	Annual Amount	Annualized Full-Time Amount
Basic salary	NA	0	0	0
Housing allowance (Basic salary)	50	0	0	0
Travel allowance	NA	19,600	19,600	19,600
City allowance (Basic salary)	10	0	0	0
Overall salary	NA	19,600	19,600	19,600

When you enter the basic salary amount of 50,000, the salary calculations automatically decide the other component values.

Component Name	Percentage	Amount	Annual Amount	Annualized Full-Time Amount
Basic salary	NA	50,000	50,000	50,000
Housing allowance (Basic salary)	50	25,000	25,000	25,000
Travel allowance	NA	19,600	19,600	19,600

Component Name	Percentage	Amount	Annual Amount	Annualized Full-Time Amount
City allowance (Basic salary)	10	5,000	5,000	5,000
Overall salary	NA	99,600	99,600	99,600

## Change Salary Action

It's a year later and you want to change the person's salary. The Change Salary page shows the current salary details. In the prior amount column, you see the current component amounts adjusted for frequency and FTE, if any.

Component Name	Prior Amount	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Basic salary	50,000	0	0	NA	50,000	50,000
Housing allowance (Basic salary)	25,000	0	0	0	25,000	25,000
Travel allowance	19,600	0	0	NA	19,600	19,600
City allowance (Basic salary)	5,000	0	0	10	5,000	5,000
Overall salary	99,600	0	0	NA	99,600	99,600

You can use either the adjustment amount or adjustment percentage to calculate the new component amount. Or you can directly enter the new component amount. Whichever way you make your changes, as you enter the values, other values for that component get recalculated. And the other effected components with a higher process order also get recalculated.

Component Name	Prior Amount	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Basic salary	50,000	5,000	10	NA	55,000	55,000
Housing allowance (Basic salary)	25,000	5,250	21	55	30,250	20,250
Travel allowance	19,600	400	2.04	NA	20,000	20,000
City allowance (Basic salary)	5,000	500	10	10	5,500	5,500

Component Name	Prior Amount	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Overall salary	99,600	11,150	11.19	NA	110,750	110,750

## Working Hours Change and Simple Components

When you change a person's FTE (full-time equivalent) value, for example from 1 to .9, the prior component amounts automatically adjust for the proposed FTE. This way you can do a direct comparison between current and proposed amounts.

ORACLE

NR

Change Working Hours

Neil (T4) RJ

Save

Submit

Cancel

1 When and Why

2 Working Hours

3 Salary

\*Salary Basis

Standard Mandatory Components

Component Name	Prior Amount	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Basic salary	49,500.00	0.00	0.00		49,500.00	49,500.00
Housing allowance (Basic salary)	27,225.00	0.00	0.00	55.00	27,225.00	27,225.00
Travel allowance	18,000.00	0.00	0.00		18,000.00	18,000.00
City allowance (Basic salary)	4,950.00	0.00	0.00	10.00	4,950.00	4,950.00
Overall salary	99,675.00	0.00	0.00		99,675.00	99,675.00

Action

Working Hours Change

Adjusted to 0.9 FTE Values

\*Salary Amount

99,675.00 USD Annually

Adjustment Amount

0.00 USD

Annual Salary

99,675.00 USD (FTE 0.9)

Next Salary Review Date

m/d/yy

Current Salary

110,750.00 USD Annually

Proposed Salary

99,675.00 USD Annually

0.00 (0.00%)

Hide Current Salary Details

Salary Basis

Standard Mandatory Components

Component Name	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Basic salary	5,000.00	10.00		55,000.00	55,000.00
Housing allowance (Basic salary)	5,250.00	21.00	55.00	30,250.00	30,250.00
Travel allowance	400.00	2.04		20,000.00	20,000.00
City allowance (Basic salary)	500.00	10.00	10.00	5,500.00	5,500.00
Overall salary	11,150.00	11.19		110,750.00	110,750.00

Action

Salary Change

1 FTE Values

Salary Amount

110,750.00 USD Annually

Adjustment Amount

11,150.00 USD

Annual Salary

110,750.00 USD (FTE 1)

Next Salary Review Date

Seniority Dates

## Salary Frequency Change and Simple Components

When you change from a salary basis with a monthly frequency to a salary basis with an annual frequency, the prior component amounts adjust automatically.

The current monthly amounts get converted to prior annual amounts. And these annual amounts become the default proposed amounts and annual amounts. This way values set for simple components of a salary basis configuration carry forward to the simple components of another salary basis.

ORACLE

Change Salary

Fred RJ

Save

Submit

Cancel

1 When and Why

2 Salary Details

3 Comments and Attachments

\*Salary Basis

Standard Mandatory Components

Component Name	Prior Amount	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Basic salary	60,000.00	0.00	0.00		60,000.00	60,000.00
Housing allowance (Basic salary)	30,000.00	0.00	0.00	50.00	30,000.00	30,000.00
Travel allowance	19,200.00	0.00	0.00		19,200.00	19,200.00
City allowance (Basic salary)	6,000.00	0.00	0.00	10.00	6,000.00	6,000.00
Overall salary	115,200.00	0.00	0.00		115,200.00	115,200.00

\*Salary Amount

115,200.00 USD Annually

Adjustment Amount

0.00 USD

Adjustment Percentage

0.00 %

Annual Salary

115,200.00 USD (FTE 1)

Current Salary

9,600.00 USD Monthly

8,666.67

12,133.33

Monthly amount adjusted to annual amount

Annualized Full-Time Salary

115,200.00 USD

Grade Name

ZCMP IC2

Compa-Ratio

76.80

Quartile

1

Proposed Salary

115,200.00 USD Annually

0.00 (0.00%)

100,000.00

200,000.00

Hide Current Salary Details

Salary Basis

Standard Monthly Components

Component Name	Percentage	Amount	Annual Amount
Basic salary		5,000.00	60,000.00
Housing allowance (Basic salary)	50.00	2,500.00	30,000.00
Travel allowance		1,600.00	19,200.00
City allowance (Basic salary)	10.00	500.00	6,000.00
Overall salary		9,600.00	115,200.00

Salary Amount

9,600.00 USD Monthly

Annual Salary

115,200.00 USD (FTE 1)

Annualized Full-Time Salary

115,200.00 USD

Grade Name

ZCMP IC2

Compa-Ratio

92.31

Quartile

2

Quintile

2

Monthly amount

Continue



## Component Type Changes and Simple Components

When you change from a salary basis with simple components to a salary basis that includes components of the same name and type, the component values carry across the salaries. If the type changes, you don't see a prior amount.

The salary bases in this example both have five simple components.

- Both bases include the Basic salary, Travel allowance, and Overall salary components and the components have the same type.
- Both bases include the Housing allowance component. But the first basis has the user entering a percentage while the second basis has the user entering an amount.
- Only the first basis includes a City allowance component.
- Only the second basis has a Variable allowance component.
- The first salary basis has an annual frequency and all five components are required.
- The second salary basis has a monthly frequency and three components are required while two components are optional.

### Annual Salary Basis with Five Required Components

Component	Type	Component Percentage Applies To	Affect on Overall Salary	Optional	Default Value
Basic salary	User enters amount	NA	Add	No	0
Housing allowance	User enters percentage	Basic salary	Add	No	50
Travel allowance	Fixed amount	NA	Add	No	19,200
City allowance	Fixed percentage	Basic salary	Add	No	10
Overall salary	Overall salary	NA	No effect	No	NA

### Monthly Salary Basis with Three Required Components and Two Optional Components

Component	Type	Component Percentage Applies To	Affect on Overall Salary	Optional	Default Value
Basic salary	User enters amount	NA	Add	No	None
Housing allowance	User enters amount	NA	Add	No	None
Travel allowance	Fixed amount	NA	Add	Yes, don't carry forward	1,600



Component	Type	Component Percentage Applies To	Affect on Overall Salary	Optional	Default Value
Overall salary	Overall salary	NA	No effect	No	NA
Variable allowance	User enters amount	NA	No effect	Yes, don't carry forward	0

You start proposing a salary change and select the second salary basis. You can see that only the prior Basic salary amount adjusted for the new frequency, from 50,000 to 4,166.67. Even though the Housing allowance exists in the second salary basis, you don't see a prior amount because the component types are different.

**Change Salary**  
Price RJ

When and Why

**Salary Details**

The amounts were recomputed using the worker's new salary basis.

\*Salary Basis  
Standard Mandatory Components with Different Components

Choose Components

Component Name	Prior Amount	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Basic salary	4,166.67	0.00	0.00		4,166.67	50,000.00
Housing allowance					0.00	0.00
Overall salary	8,333.33	-4,166.67	-50.00		-4,166.67	50,000.00

\*Salary Amount  
4,166.67 USD Monthly

Adjustment Amount  
-4,166.67 USD

Adjustment Percentage  
-50.00 %

Current Salary  
100,000.0000 USD Annually

Proposed Salary  
4,166.67 USD Monthly

Hide Current Salary Details

Salary Basis  
Standard Mandatory Components

Component Name	Percentage	Amount	Annual Amount
Basic salary		50,000.0000	50,000.0000
Housing allowance (Basic salary)	50.0000	25,000.0000	25,000.0000
Travel allowance		20,000.0000	20,000.0000
City allowance (Basic salary)	10.0000	5,000.0000	5,000.0000
Overall salary		100,000.0000	100,000.0000

Salary Amount  
100,000.0000 USD Annually

Annual Salary  
100,000.0000 USD (12 M)

Annualized Full-Time Salary  
100,000.0000 USD

Grade Name  
JCMF R1

Comp Ratio  
72.73

Quartile  
1

Quintile  
1

Comments and Attachments

Next, you include the optional components, which appear in the last rows of the table, below the Overall salary component. You can see that the prior Travel allowance amount automatically adjusted from 19,200 to 1,600 because of the new frequency.

PR

Change Salary  
Price RJ

Save Submit Cancel

1 When and Why

2 Salary Details

\*Salary Basis  
Standard Mandatory Components with Different Components

Choose Components

Component Name	Price Amount	Adjustment Amount	Adjustment Percentage	Percentage	Amount	Annual Amount
Basic salary	4,166.67	0.00	0.00		4,166.67	50,000.00
Housing allowance					0.00	0.00
Overall salary	8,333.37	-2,500.00	-30.24		5,766.67	69,200.00
Travel allowance	1,000.00	0.00	0.00		1,000.00	12,000.00
Variable allowance					0.00	0.00

\*Salary Amount  
5,766.67 USD Monthly

Adjustment Amount  
-2,500.00 USD

Adjustment Percentage  
-30.24 %

Current Salary  
99,200.0000 USD Annually

Annual Salary  
69,200.00 USD (PTE %)

Annualized Full-Time Salary  
69,200.00 USD

Grade Name  
23SAP R2.1

Proposed Salary  
5,766.67 USD Monthly

Hide Current Salary Details

Component Name	Percentage	Amount	Annual Amount
Basic salary		50,000.0000	50,000.0000
Housing allowance (Basic salary)	50.0000	25,000.0000	25,000.0000
Travel allowance		10,000.0000	10,000.0000
City allowance (Basic salary)	10.0000	5,000.0000	5,000.0000
Overall salary		90,000.0000	90,000.0000

Salary Amount  
99,200.0000 USD Annually

Annual Salary  
99,200.0000 USD (PTE %)

Annualized Full-Time Salary  
99,200.0000 USD

Grade Name  
23SAP R2.1

Comp Ratio  
73.15

Quartile  
Below Range

Quintile  
Below Range

Continue

3 Comments and Attachments

## 14 Salary Basis FAQs

### Can I change or delete a salary basis that's in use?

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

### Can I add effective-dated changes to the salary basis?

No because the salary basis isn't an effective-dated object.

### 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 person's assignment decides the number of payroll periods in a year. These payroll periods are the annualization factor.

### Can I use the same payroll element for multiple salary bases?

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

#### *Related Topics*

### Can I update an element mapped to a salary basis that's in use?

Yes, but only the next salary change recognizes the updated element or input value. At that time, salary processing end dates the element entry associated with the prior salary.

When you update the element mapping, no changes apply to the person's data.

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

Yes. You can hide or show the edit capability for managers using personalization on the pages where managers enter salary allocations.

# 15 Salary Ranges and Metrics

## How You Validate Salary Changes with the Grade Range

You can verify that salary changes fall within the appropriate range for each person using grade range validation.

This validation generates a warning message when someone enters a new or adjusted salary that's outside the person's assignment grade range. The person can ignore the message or revise the salary to fall within the valid range.

The assignment grade in the grade rate attached to the salary basis defines the minimum and maximum grade range values. You can adjust the base ranges by linking a differential profile to the salary basis. Differentials apply according to one of these criteria:

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

You can also associate grade rate differentials that override the grade rate, and thus the grades and grade ranges, associated with the salary basis. The grade rate from the differential profile needs to have corresponding grades for all the grades of the grade rate linked to the salary basis.

### *Related Topics*

- [Overview of Salary Range Differentials](#)
- [Grade Rates](#)

## Salary Range Violation Behavior for Proposed Salaries

Specify how to handle salary range violation for various compensation actions, such as Change Salary and Salary History. This handling also applies to Offer and HR actions that include the Salary section, such as Offer, Hire, Promote, and Transfer.

You configure violation behavior using the Salary Range Violation Behavior field of the salary basis. You can let people propose salaries that violate the salary range with or without a warning. Or, you can prevent people from proposing any salaries that violate the salary range. For example, you warn people when their proposed salaries are below or over the specified salary range. Or, you don't let anyone propose salaries that are below or over the specified salary range.

The default value for the Salary Range Violation Behavior field of all existing salary bases is Warn. We don't recommend that you change it to Error for existing salary bases because you can get errors with historic data. For example, you've an existing salary basis with a salary range of 100 to 200 USD. The salary basis is associated with a 2010 salary record where the salary amount was 95 USD. It's also associated with a 2015 salary record where the salary amount was 105 USD. When you change the violation behavior to Error and try to load salary for 2020, you can get the violation error for 2010. The error occurs even though that's not the record you're correcting. To set the violation behavior to Error, then

we recommend that you create another salary basis to use with new salaries. This way, you can avoid issues with historic data.

When you set the violation behavior to Warn, you don't see the warning message when you load salaries using these tools: REST API, HCM Data Loader, and HCM Spreadsheet Data Loader. These tools show you only errors. The Download Salaries task and grade step progression processes ignore this violation behavior.

#### *Related Topics*

- [Overview of Base Pay Configuration](#)
- [How You Validate Salary Changes with the Grade Range](#)
- [Overview of Salary Range Differentials](#)
- [How Salary Metrics Change According to the Grade Rate and Salary Range Differentials](#)

## How Salary Metrics Are Calculated

Salary amount has a date while full-time equivalent (FTE), grade, grade rate, and differential profile have effective dates. Thus, a salary record can apply logic for multiple combinations of FTE, grade, grade rate, and differential to 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. Here's how we decide that date:

- If the salary record has an end date that's earlier than the current date, then use the salary end date.
- If the start date of the salary record is in future, then use the salary start date.
- If the salary record started in the past and doesn't have an end date, then use the current system date.

#### *Related Topics*

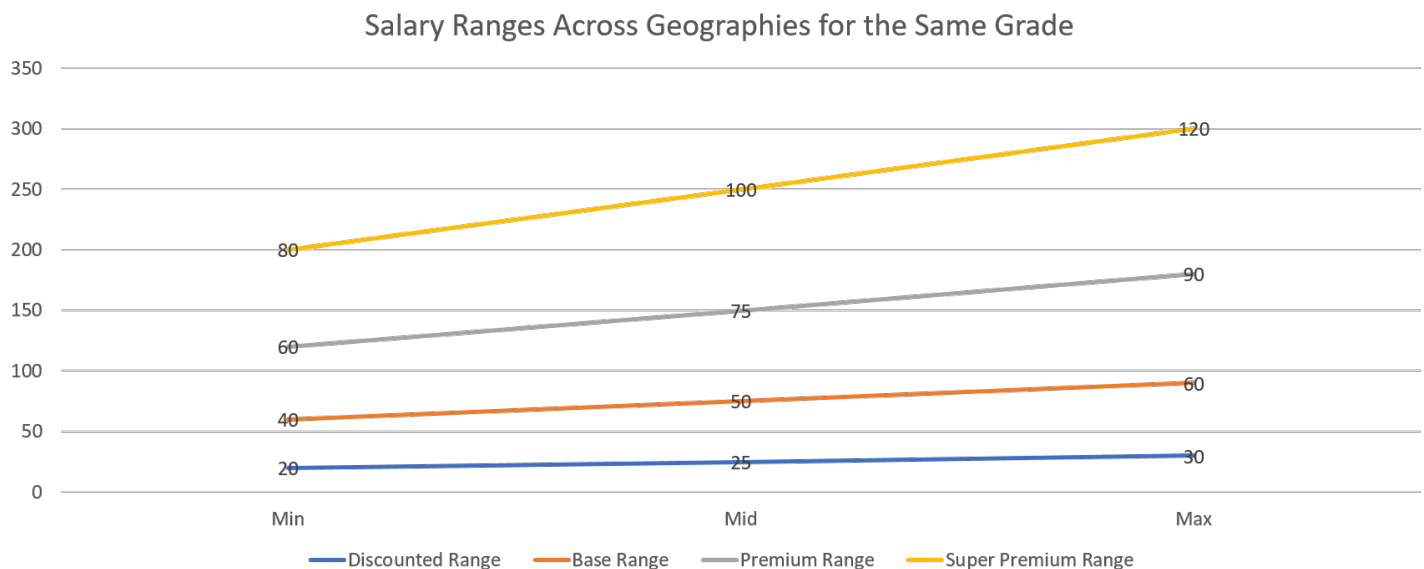
- [How Salary Metrics Change According to the Grade Rate and Salary Range Differentials](#)

# 16 Salary Range Differentials

## Overview of Salary Range Differentials

You can configure salary range differentials to adjust base salary ranges from the grade rate associated with the salary basis. Differentials vary, for example, to reflect the cost of living in different locations or the relative ease of hiring.

For example, salaries for workers in the Central US are in the base range of the grade rate. Salaries for workers in the South are in a discounted range with a 0.9 factor, and for workers on the East and West Coasts, they're in a premium range with a 1.1 factor. Salaries in New York City, Los Angeles, and San Francisco are in a super-premium range with a factor of 1.2.



Select the level of granularity that best supports your salary policies and processes:

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

When using a Grade Rate type differential profile, you can configure an overriding grade rate to use instead of the salary basis grade rate. The adjusted salary range is the range of the overriding grade rate.

When using a Factor type differential profile, you can configure the differentials to enforce relevant statutory limits around minimum salaries by setting lower limits.

You can also configure compensation zone, and compensation zone and business unit differentials to account for nonoffice workers. Do this by specifying which address types to use, and in what order, to identify the applicable differential. For example, you're going to associate the differentials with people who work at client sites and from home. And, you want to use their remote addresses, rather than their work addresses to identify their compensation zones and differential factors. You want to identify the client site address first and the home address only if there isn't a client site address.

#### Related Topics

- [How Salary Metrics Are Calculated](#)
- [How Salary Metrics Change According to the Grade Rate and Salary Range Differentials](#)

## Configure Salary Range Differentials

Here's how you configure salary range differentials using the Salary Range Differentials task in the Compensation work area.

1. On the Salary Range Differentials page, click the **Create** icon.
2. On the Create Salary Range Differential page, in the Properties section, complete the required fields.
3. Select the criteria, such as **Location** or **Compensation Zone**.
4. Select the type.
5. In the Differentials section, configure the differentials. When your criteria is compensation zone based, you can select the **Factor** or **Grade Rate** type.
  - To configure the differential to apply factors to the existing grade rates, select **Factor**.
  - To configure the differential to apply alternate grade rates in place of the grade rate associated with the salary basis, select **Grade Rate**.
6. Optionally, for differentials that use compensation zone criteria, enable checking for the remote worker address type. Specify up to three address types to check in the order that differential processing should consider them. The process stops checking as soon as it finds an address, whether that address is in the first address type or the last.
7. Save and close the differential.

#### Related Topics

- [Overview of Salary Range Differentials](#)
- [Configure Compensation Zone Types and Zones](#)
- [How Salary Metrics Change According to the Grade Rate and Salary Range Differentials](#)



# Basic Process to Configure and Apply Zone-Based Salary Range Differentials

You need to complete these tasks to set up and use compensation zones in salary range differentials. These types of differential profiles work with only responsive salary pages and flows. Classic pages and flows ignore them.

1. Create compensation zone types using the Compensation Zones task in the Setup and Maintenance work area. It's part of the Compensation offering, Base Pay functional area.

You use compensation zone types, such as compensation or wage regions, to categorize zones and group them together. You need to create your zone types before you define one or more zones for a geographical boundary. You can create a zone type that contains geographical boundaries from anywhere in the world, or that contains only geographies in a specified country. When you create a zone type for a country, you can define which geography types or geographies you can select when you create the zones.

2. Create compensation zones using Compensation Zones task in the Setup and Maintenance work area. It's part of the Compensation offering, Base Pay functional area.

Compensation zones are geographical boundaries for a zone type, for example, the San Jose compensation zone. Zones are based on the geography hierarchy data of the master reference. You create zones in a zone type and you can associate geographies to define the zone. For example, you've the Compensation Regions zone type. You create a West Coast zone that has the state of California as one of its geographies. In a geography, you can specify a postal range. So for the state of California, for example, you can specify that the zone spans the postal codes 90001 through 90011.

Compensation zones are intelligent enough to apply salary range differentials based on the worker's assignment or nonassignment location. For example, they can apply the differential to the work location or a remote location, such as a client location or home address. The salary range differential identifies the compensation zone that the address is part of, and applies the factor or overriding grade rate defined for that zone.

Optionally load compensation zone geographies using only the Export to CSV File and Import from CSV File actions for the Compensation Zones task.

3. Create zone-based salary range differentials using the Salary Range Differentials task on the My Client Groups > Compensation page. You can also create them using HCM Data Loader or HCM Spreadsheet Data Loader. You configure salary range differential details at the level of granularity that best supports your salary policies and processes. For example, you can maintain differential factors at the location level, or at the State or District level. Add compensation zone criteria and define the differentials for each zone type and zone.

Optionally set minimum limits when you've statutory minimum salary limits that you need to enforce. You can also enable work from home processing for people working remotely, such as at client sites or from home.

4. Create salary bases using the Salary Basis task on the **My Client Groups > Compensation** page. On the Salary Ranges tab, add a grade rate to the salary basis. Then add the appropriate zone-based differential profile.

## Related Topics

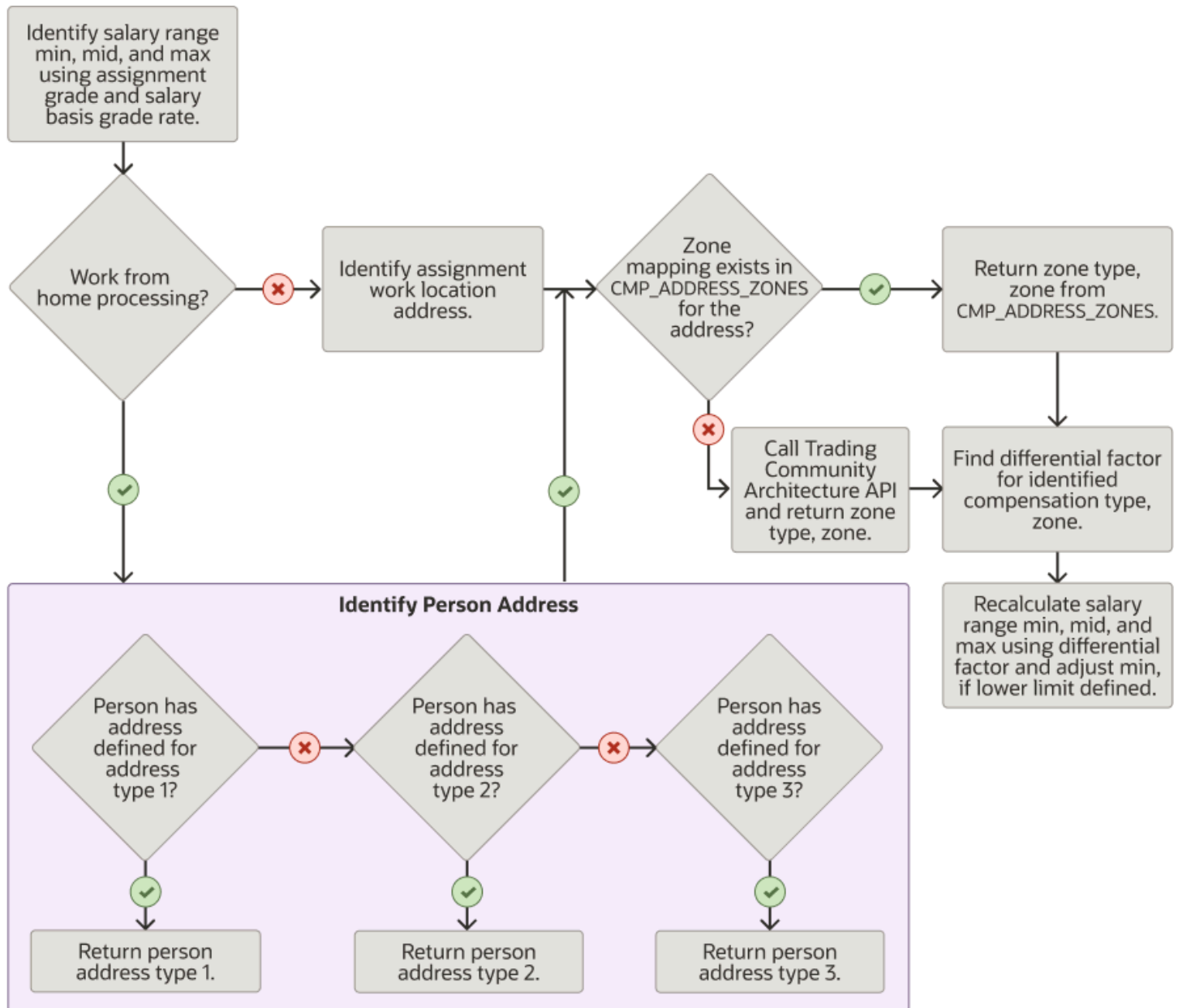
- [Configure Compensation Zone Types and Zones](#)
- [Configure Salary Range Differentials](#)
- [Overview of Base Pay Configuration](#)

## Zone-Based Salary Range Differential Processing

Differential processing identifies the minimum, midpoint, and maximum points of the salary range using the assignment grade and the grade rate of the salary basis. When the worker is working from home, it then decides if the differential profile has work from home processing enabled.

- If not enabled, it finds the work location to process. If there's no work location or a location isn't included in the differential profile, the salary basis grade rate is used in payroll processing. No differential is applied.
- If enabled, it finds the person addresses to process.

Next differential processing finds the compensation zone type and zone for the identified address of work location or person. And it applies the differential factor or overriding grade rate for the corresponding compensation zone type and zone. It uses the differential factor or overriding grade rate to recalculate the minimum, midpoint, and maximum points of the salary range.



## Work Location Example

Here's an example of this differential processing based on the work location for two workers in California. They both have the same assignment grade and salary basis. Their locations put them in different compensation zones, so their salary ranges and related salary metrics are thus different.

Assignment Info	Worker 1	Worker 2
Grade	ZMCP IC1	ZMCP IC1
Work Location	Bakersfield Branch Office	Redwood Shores HQ
<b>Salary Info</b>		
Salary Basis	Individual Contributor	Individual Contributor
Grade Name	ZMCP IC1	ZMCP IC1
Salary Range	50,000 – 100,000 USD annually	150,000 – 300,000 USD annually
Compensation Zone Type	Individual Contributor CA	Individual Contributor CA
Compensation Zone	Bakersfield	Headquarters
Salary	61,000 USD annually	161,000 USD annually

## Remote Work Example

Here's how differential processing would change the salary range for Worker 2 if they were a remote worker. They live in Modesto, CA, which is in the same compensation zone as Bakersfield.

Assignment Info	Worker 2
Work Location	Redwood Shores, CA
Home Address	Modesto, CA
Grade	ZMCP IC1
Working at Home?	Yes
<b>Salary Info</b>	
Salary Basis	Individual Contributor
Grade Name	ZMCP IC1
Salary Range	50,000 – 100,000 USD annually
Compensation Zone Type	Individual Contributor CA
Compensation Zone	<b>Bakersfield</b>
Salary	161,000 USD annually

## Factor Type Salary Range Differentials That Include Lower Limits

You might have statutory limits for salaries that you need to enforce, such as salary minimums. You can enforce lower limits in factor type salary range differentials associated with salary bases.

These differential processing flows compare the processing behavior when the differential has lower limits versus when it doesn't. In this example differential profile, the Redwood Shores HQ zone has a lower limit of 160,000.

Compensation Zone	Differential Factor	Lower Limit	Frequency of Minimum Amount	Annualization Factor for Minimum Amount
Redwood Shores HQ	1.5	160,000	Annually	1
Bakersfield Branch Office	0.5	80,000	Annually	1

The base range of the salary basis that includes this differential profile is 100,000 to 200,000. Normally, the adjusted ranges for the Redwood Shores HQ zone would be 150,000 to 300,000 after applying the 1.5 differential. But, this differential has a lower limit of 160,000 and that minimum overrides the 150,000 minimum. So the effective salary range becomes 160,000 to 300,000. If the differential profile didn't have any lower limit, the adjusted base range would remain 150,000 to 300,000.

## Configure Compensation Zone Types and Zones

Here's how you configure the compensation zone types used to group zones together and the zones that make up a zone type. Use the Compensation Zones task in the Compensation Management offering, Base Pay functional area.

### Create the Compensation Zone Type

We recommend limiting the number of compensation zone types, preferably to 1, such as by postal code. Here's how you create a zone type:

1. On the Manage Zone Types page, click the **Create** icon.
2. Enter a name for the zone type.
3. Specify the boundary of the zone type.
4. Select the geography.
5. At the appropriate geographic level, such as Postal Code, select **Zone Creation Allowed**.

**CAUTION:** You need to make sure that geography validation is enabled for the No Styles Format address style of the selected geography level. Otherwise you won't see the adjusted salary ranges for individuals in this compensation zone. Use the Manage Geographies task and the Manage Geography Validation action.

## Create a Zone

Configure your zones so that an address is part of only one zone. If an address is part of multiple zones, the salary changes that include zone-based differentials can't figure out which zone applies. Thus, they can't apply any differential. Also, configure the zones for a zone type at the same level to minimize or prevent zone overlaps. For example, if Zone 1 is at the State level, then define the other zones at the State level also.

Here's how you create a zone:

1. On the Manage Zone Types page, search for and select your new zone type. If you click the zone type, you open a read-only page with details of the zone type configuration. You can't add zones from that page.
2. Click **Next**.
3. On the Manage Zones for Zone Type page, click the **Add** icon.
4. On the Create Zone page, enter the general information.
5. Associate geographies with your new zone.
  - a. Click the **Add** icon.
  - b. On the Add Geography dialog box, search for and select the geography that you want to add.
  - c. Click **Save and Close**.
  - d. Review the start dates of the associated geographies. When you associated the geography, it automatically set the start date to the system date at that time. You can edit the date, as needed.
  - e. When you finish associating geographies, on the Create Zone page, save and close your new zone.
6. When you finish adding zones to your zone type, on the Manage Zones for Zone Type page, save and close your zone type.

## Best Practices When Using Postal Codes

If you've fewer than 5 postal codes, add the codes directly in the zone definition instead of using postal ranges. For example, add the 90009 postal code directly to the zone instead of adding it as the range, from 90009 to 90009.

Avoid defining overlapping geographies or postal code ranges across compensation zones. For example, you defined these postal code ranges:

- Compensation Zone 1 for CA with the range from 91000 to 91999
- Compensation Zone 2 for CA with the range from 91111 to 91729

In this case, the differential profile logic identifies both compensation zones for the 91112 postal code and thus won't apply any differentials for 91112.

**Tip:** The postal code data type is CHAR, so the zone ranges get calculated as character ranges, not numeric. For example, a zone with the postal range from 10 to 100 includes these postal codes: 11, 12, 13, and 14. It doesn't include these postal codes: 20, 21, 30, 31, 40, 90, 99.

### Related Topics

- [Overview of Salary Range Differentials](#)
- [Configure Salary Range Differentials](#)
- [How Salary Metrics Change According to the Grade Rate and Salary Range Differentials](#)

## Compensation Zone-Based Differential: Options for When Work from Home Is Yes, But Evaluation Should Use Work Locations

You can configure compensation zone-based salary range differentials to evaluate remote worker addresses and calculate salary ranges. And you can specify the processing order for up to three address types.

You can configure compensation zone-based salary range differentials to evaluate remote worker addresses and calculate salary ranges. And you can specify the processing order for up to three address types.

When using this kind of differential, can you use work locations to identify the applicable differential for certain remote workers? For example, in some US states, remote workers have the option to go into an office. Or they need to go in 1 or 2 days a week. So for some states, even when Work from Home is Yes, you want the differential to use the work location.

Here are three configuration options that let you use people's work locations to identify the applicable differentials, even when Work from Home is Yes.

### Separate Differentials and Salary Bases

In this approach, you can create two different differential profiles for the remote workers.

- One differential doesn't process remote workers, thus evaluating only people's work locations.
- Another differential does process remote workers and specifies to use home addresses.

Each set of remote workers needs to have a different salary basis, such as, US Remote by Work and US Remote by Home.

### Different Field to Record Actual Work from Home Status

In this approach, you can use a different assignment field or a descriptive flexfield to record the actual work from home status. The value of this other field could typically be the same as the value of the delivered Work from Home assignment field. But you can vary the value for people in the states where differential processing should use the work location instead of remote addresses.

- Where differential processing should use remote workers' home addresses, make sure that the Work from Home assignment field is Yes.
- Where differential processing should use remote workers' work locations, make sure that the Work from Home assignment field is No.

Then you can create a differential that processes remote workers. Processing will evaluate the addresses as specified.

### Person Addresses with Work Locations

In this approach, you extend the address type lookup to let you set up a work address as another person address. Next, for the remote workers where differential processing should use their work location, you create the appropriate work person addresses. Then you create a differential with remote worker processing enabled. Processing will evaluate the specified address types in the specified order.

For example, a remote worker has a home-type address in Jacksonville, FL, a work-type address in Orlando, FL. And their Work from Home is Yes. Their differential has the Work address type as sequence 1 and Home address type as sequence 2, so differential processing uses their Orlando, FL address.

This approach means that every applicable remote worker will also have their work address maintained as one of their person addresses. Whenever the work location changes, someone also needs to manually change the corresponding person address.

## Generate Compensation Zone and Address Mapping

For salary range differentials with compensation zone criteria, differential processing finds the zone and zone type each time someone views and adjusts the salary amount.

The differential process does this by evaluating the person's maintained addresses against the defined compensation zones. Depending on the number of zones, zone types, and address details, this evaluation can be time consuming. To see the correct salary ranges in Oracle Fusion Cloud Workforce Compensation and Oracle Transactional Business Intelligence reports, run the Generate Compensation Zone and Address Mapping process. Also run it to optimize differential processing because it finds the compensation zone and zone type for each address, and stores them for immediate reference.

You can run the generate process in two modes.

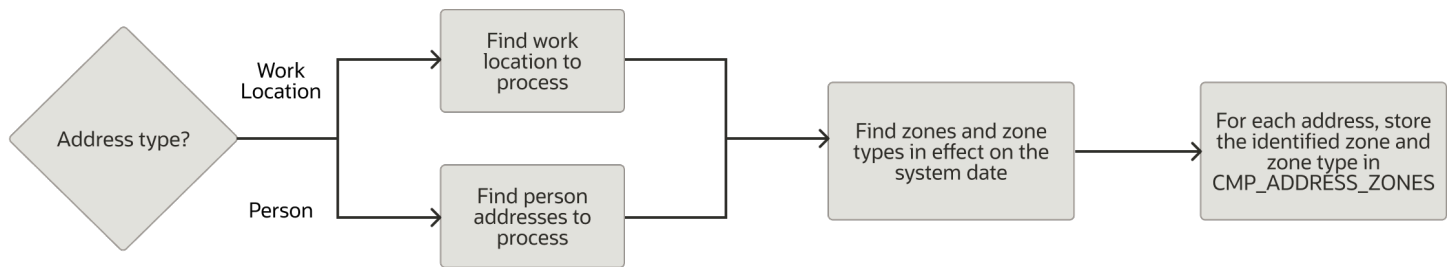
Run Mode	Descriptions
Create incremental mappings	Creates mappings between zones and zone types that match the specified parameters and person or work location addresses when something changed or is new
Purge and recreate mappings	Purges all existing mappings  Creates the maps again between the zones and zone types that match the specified parameters and all person or work location addresses

Here's how we recommend that you schedule the process.

Schedule Mode	Descriptions
One-Time	Run the mapping process to create all zone mappings for both work location and person addresses. You might use this mode to create a baseline. You might also use it to update work location addresses because they change infrequently.
Recurring	Schedule the mapping process to run regularly to create incremental zone mappings. You might use this mode to update person addresses for remote workers because they can change more often. For example, client work locations change as the person moves changes projects.

The generated mappings improve the performance of responsive pages with salary information. The differential process knows the person's compensation zone and can apply the relevant differential to salary range calculations. Here's the high-level process flow.





When the mapping isn't available, differential processing finds the zone and zone type for the person or work address. It then applies the relevant differential.

#### Related Topics

- [Overview of Salary Range Differentials](#)
- [Configure Compensation Zone Types and Zones](#)

## Enable Geography Validation for Compensation Zones

You need to make sure that geography validation is enabled for the No Styles Format address style of the selected geography level.

1. In the Setup and Maintenance work area, search for and click the **Manage Geographies** task.
2. On the Manage Geographies page, search for a country. For example, you can search by entering the country name **United States** or the two letter ISO code **US**.
3. In the Search Results area, select the country, such as United States.
4. On the Actions menu, select **Manage Geography Validation**.
5. On the Manage Geography Validation page, you see the geography types that are available for the country in the Geography Mapping and Validation section.
6. Make sure that the **No Styles Format address** style is selected. You define validation for this address style so that the validations are run for all addresses in the country.
7. For the geography types to include in the geography validation, such as Postal Code, select **Geography Validation**.

# Load Compensation Zone Geographies Using CSV File Export and Import

After you create your compensation zone types and zones, you can load the corresponding zone geographies from a .csv file.

1. In the Setup and Maintenance work area, select the Compensation offering, Base Pay functional area.
2. In the Base Pay section, Show field, select **All Tasks**.
3. If you don't see the Actions column, on the toolbar select **View > Columns > Actions**.
4. Generate a CSV export package for the Compensation Zones task by selecting **Actions > Create New > Export to CSV File**.
  - a. On the Export Setup Data to CSV File page, enter a descriptive process name.
  - b. Click **Submit**.
5. Track the export process by selecting **Actions > View All > Export to CSV File**.
6. Download the export file from the Export Setup Data to CSV File History: Compensation Zones page, after the export process completes. Select **Actions > CSV File Package > Download**.
7. Extract the contents from the .zip file to an appropriate folder.
8. Open the ORA\_HZ\_GEO\_RELATIONSHIP.csv file.
9. Using the existing geography rows as reference, add the new geographies. For each new geography, you need to add 2 rows to the file. To avoid corrupting the data, use a text editor, such as Notepad++, and not Microsoft Excel. Save the file as you go and when you're done.

Also, the ORA\_HZ\_GEO\_RELATIONSHIP.csv file has three start date columns. Here's the date you need to enter in each column:

- o StartDate: Enter the start date of the zone.
- o SubjStartDate:
  - If the 'SubjGeographyName' column is zone, enter the zone start date.
  - If the 'SubjGeographyName' column is postal code, enter the postal code start date.
- o ObjStartDate:
  - If the 'ObjGeographyName' column is zone, enter the zone start date.
  - If the 'ObjGeographyName' column is postal code, enter the postal code start date.

You can source the start and end dates by running these two queries:

```
SELECT
  geography_name,
  country_code,
  geography_element2,
  geography_element3,
  geography_element4,
  to_char(start_date, 'YYYY/MM/DD') start_date,
  to_char(end_date, 'YYYY/MM/DD') end_date,
FROM
```

```
SELECT
  geography_name,
  to_char(start_date, 'YYYY/MM/DD') start_date,
  to_char(end_date, 'YYYY/MM/DD') end_date,
FROM
  fusion.hz_geographies
WHERE
  geography_name in ('_ZONE_NAME')
```

```
fusion.hz_geogrpahies
WHERE
  geography_name in ('999999')
  AND country_code = 'US'
  AND geography_type = 'POSTAL_
CODE'
  AND geography_use = 'MASTER_
REF'
ORDER BY
  Geography_element2,
  Geography_element3,
  Geography_element4,
  Geography_name
```

10. Create a .zip file with all the extracted files and the updated ORA\_HZ\_GEO\_RELATIONSHIP.csv file.
11. Import the .zip file for the Compensation Zones task by selecting **Actions > Create New > Import from CSV File**.
12. On the Import Setup Data from CSV File page, search for and select the new .zip file.
13. Click **Submit**.
14. Track the import process by selecting **Actions > View All > Import from CSV File**.
15. After the process completes, you're ready to verify the loaded geography data.



# 17 Base Pay Lookups and Troubleshooting

## Incremental Salary Component Lookups

HR specialists and line managers can use incremental salary components to itemize new or adjusted salary, to reflect the different reasons for their allocations. Here are the incremental components bundled in the implementation:

- Adjustment: Regular and automatic adjustment
- Cost of Living
- Equity: Adjustment to correct salary compression or inversion
- Location
- Market: Adjustment due to salary being out of line with the market
- Merit
- Promotion
- Progression: Regular and automatic adjustment
- Structured: Adjustment dictated by union or employment contract, such as an increase after 3 months

You can change or add components to the CMP\_SALARY\_COMPONENTS lookup type to better support your reporting policies for salary allocations. Use the Manage Common Lookups task in the Setup and Maintenance work area.

## Itemization

The salary record stores the incremental component itemizations and uses them to calculate new salary. When component values change, the payroll element holds the new salary amount calculated from the component adjustments. But it doesn't receive individual component amounts for processing. The incremental values entered in the salary record apply only to that record and don't apply to any future salary records.

### *Related Topics*

- [How You Enable Salary Itemization Using Incremental Components](#)
- [Overview of Lookups](#)

## Simple Salary Component Lookups

HR specialists and line managers can use simple salary components to itemize new or adjusted salary, to reflect the different reasons for their allocations. Here are the simple components bundled in the implementation:

- Basic salary
- Housing allowance
- Special allowance
- City allowance

- Transport allowance
- Travel allowance
- Wage progression rate
- Variable allowance
- Overall salary

You can change or add components to the `ORA_CMP_SIMPLE_SALARY_COMPS` lookup type to better support your reporting policies for salary allocations. Use the Manage Common Lookups task in the Setup and Maintenance work area.

## Itemization

Simple component itemizations let you maintain the values for the components and you typically configure them to calculate new salary. When simple component values change, the salary record calculates the new salary amount. The payroll element holds this new salary amount, but it doesn't receive individual component amounts for processing.

### Related Topics

- [Salary Amount Is Determined by Simple Components](#)
- [Overview of Lookups](#)

## Troubleshoot Salary-Related Issues

Here are some salary-related issues that may occur and solutions to help you fix them.

Issue	Solution
The salary element entry didn't get created.	<p>The salary basis element doesn't get created if inconsistencies exist between the element eligibility and the payroll data of the person's assignment.</p> <p>Using the Element Entries task in the Person Management work area, set the Effective Date to same date as the salary start date. Then search for the salary basis element in the Element Name column. If you don't see the element listed, the person isn't eligible for the element. You need to verify the eligibility and effective dates configured for the element.</p>
The salary ranges are incorrect for an hourly person.	<p>Check the annualization factor of the grade rate associated with the salary basis. The annualization factors for the salary basis and grade rate might differ, even if the frequency for both is Hourly. Salary range calculations use the frequencies and factors of the salary basis and the grade rate. If they don't match, the calculations convert grade rate values to those of the salary basis.</p>
<p>Salary changes are stuck in the approval flow.</p> <p>An individual's salary page has a message that's something like this: <b>Changes to this data are pending approval.</b> HR specialists and compensation managers or administrators don't have a Withdraw option for the transaction in their worklist. And sometimes, the person record gets locked after changing the salary.</p>	<p>Ask the person who submitted the salary change to use their worklist to withdraw the change. They can also see who the current approver is, so they can ask the approver to approve or reject the proposed changes.</p> <p>If you still see the pending approval notification in the Change Salary flow, your approvals administrator can use the transaction console to cancel the change. If you still see the pending approval, have your help desk log a bug with Oracle Support. The bug should be for the Salary component of Oracle Fusion Workforce Compensation.</p>

Issue	Solution
Salary notifications are blank.	<p>The person might have a custom role. Add the Approve Salary Updates privilege to their application role. Or, add these three resources to a custom entitlement and add the entitlement to their application role.</p> <ul style="list-style-type: none"> <li>• HcmDetectCompletedTransaction.xml</li> <li>• ChangeSalaryApprovalTask_TaskFlow.xml</li> <li>• ChangePayNtfsFlow.xml</li> </ul>
<p>The salary details in notifications are blank.</p> <p>People need to see salary information, but not make any changes.</p>	<p>The person probably doesn't have a compensation role. Depending on whether they should have read-only or read and write accesses to the salary details, add one of these job roles:</p> <ul style="list-style-type: none"> <li>• View Salaries</li> <li>• Manage Salaries</li> </ul> <p>For detailed solution steps, see Salary Details Are Not Visible in Approval Notifications - You Don't Have Permission to Access this Information (document ID <a href="#">2212593.1</a>).</p>
People need to see salary information, but must not be able to make any changes.	Grant them access to the Compensation Info task, which they can review salary information. Reserve the Change Salary role for the people who need to manage the salary data.





# 18 Default Salary from Grade Ladder Rates

## Basic Process to Default Salary Amounts from Grade Ladder Rates

Here's how you can populate someone's salary amount from grade ladder rates during HR actions that change their grade ladder, grade, or step. Examples of these HR actions are Hire, Transfer, and Promote.

1. Set up your rates using the Progression Grade Ladders task, not the Manage Grade Ladders task.
  - Set Include Salary Updates to **Yes**.
  - Set Salary Calculation Method to **Use grade step rate**.
2. Make sure that people have a salary basis where the salary amount is determined by user or simple component. If you select any other salary basis type, the grade ladder won't default the salary amount. If it uses simple components, the salary basis needs to include a Progression grade ladder rate component. You configure salary bases using the Salary Basis task.e
3. Include the Salary section in your HR action. You might need to configuration responsive pages using Transaction Design Studio in HCM Experience Design Studio.
4. Include the Grade Ladder, Grade, and Step attributes in your HR action. You need to configure responsive pages, using Transaction Design Studio in HCM Experience Design Studio.

Exception: If your grades don't have steps, then you don't need to include the Step attribute in your HR actions.

To default the salary amount from the grade ladder when you hire someone, you need to select the salary basis. Also select the grade ladder, grade, and step.

### Related Topics

- [Salary Basis Options for Determining Salary Amount](#)

## Create a Progression Grade Ladder to Default Salary Amounts

Here's how you create a progression grader ladder with rates that you can use to default salary amounts. If you default salary and run the grade step progression processes, refer to [Create a Progression Grade Ladder for Batch Processing](#).

### Before you start

Make sure that the grades exist. If they don't, create them using the Grades task on the **My Client Groups > Compensation** page.

### Here's what to do

1. Create the ladder.
  - a. On the **My Client Groups > Compensation** page, click **Progression Grade Ladder**.
  - b. On the Progression Grade Ladders page, click **Create Grade Ladder**.

Or you can duplicate an existing grade ladder. The Duplicate action ignores any historical and future versions of the ladder. It uses the version that's in effect on the date specified in your search criteria. For example, you've a grade ladder with three effective-dated versions: January 1, 1951, January 1, 2015, and January 1, 2021. You search for grade ladders using the date January 1, 2014. Since the January 1, 1951 ladder is effective then, that's the ladder that gets duplicated.

- c. On the Create Progression Grade Ladder page, Progression Ladder tab, complete the ladder details. Keep these key considerations in mind when making certain selections.

Field	Considerations
Grade Type	Specify whether the grade ladder has only grades or grades with steps. Your selection filters the Progression Increment drop-down list options, and decides which grades you can add.
Progression Increment	Keep the default value because this required field applies only to grade step progression processes.
Transaction Date	Keep the default value because this required field applies only to grade step progression processes.
Confirmation Type	Keep the default value because this required field applies only to grade step progression processes.
Assignment Action	Select any value because this required field applies only to grade step progression processing.

- d. Complete the salary update details. Keep these key considerations in mind when making certain selections.

Field	Considerations
Include Salary Updates	<p>Select <b>Yes</b>.</p> <p>The selection applies to every HR action that changes the person's grader ladder, grade, or step. These actions include when they're hired, transferred, or promoted.</p> <p>The selection also applies to grade step progression processes.</p> <ul style="list-style-type: none"><li>– <b>No</b> (default): Salary won't default from the grade ladder rates. Grade step progression processes will update the assignment, but not the salary.</li><li>– <b>Yes</b>: Salary will default from grade ladder rates. Grade step progression processes will update both the assignment and salary records.</li></ul> <p>When you select <b>Yes</b>, you configure more attributes related to grade step progression processes.</p>
Salary Calculation Method	Select <b>Use grade step rate</b> . The other value applies only to progression processes.
Transaction Date	Keep the default value because this required field applies only to grade step progression processes.
Salary Adjustment Type	To prorate the grade ladder rates based on the FTE value on the person's assignment, select an adjustment type.

- e. Complete the rate synchronization details. Keep these key considerations in mind when making certain selections.

Field	Considerations
Transaction Date	Keep the default value because this required field applies only to grade step progression processes.
Confirmation Type	Keep the default value because this required field applies only to grade step progression processes.

## 2. Add grades.

- a. On the Grades and Steps tab, Actions menu, select **Add Grade**.
- b. On the Add Grade dialog box, search for and select the grade to add. The value you select for Progression Increment decides which grades you see in the list--basically, if the grades have steps or not.
- c. Enter the sequence for where to position the grade on the grade ladder.
- d. To see any existing steps, expand the grade. The **Expand** icon isn't present if no steps exist.
- e. Add a value for each step of the grade.

## 3. Validate the progression grade ladder by selecting **Validate** on the Actions menu.

# FTE Adjustments When Salary Amount Is Determined by User

HR actions prorate the salary amount for FTE changes according to the salary adjustment type set for the grade ladder, when the salary basis type is salary amount determined by user.

Here's what happens for each salary adjustment type:

- **FTE less than 1:** HR actions adjust the salary amount only when FTE is less than 1.
- **FTE not equal to 1:** HR actions adjust the salary amount only when FTE is less than or greater than 1.
- **blank:** HR actions don't adjust the salary amount.

When FTE equals 1, HR actions ignore the salary adjustment type and don't adjust the salary amount.

HR actions adjust the salary amount even when people don't change the grade and step, such as in Change Working Hours. But if you deselect **Update salary if proposed salary is less than current salary**, any HR action that would result in a lower salary can't default the lower amount. People can still manually adjust the amount lower though.

### Related Topics

- [Global Compensation Settings for Defaulting Salary from Grade Ladder Rates](#)

## FTE Adjustments When Salary Amount Is Determined by Simple Components

When simple components decide the salary amount, HR actions ignore the salary adjustment type selected for the grade ladder. The actions always prorate the progression grade ladder rate component for FTE changes, along with other components.

The HR actions prorate the progression grade ladder rate component amount, even when the grade and step aren't changed. For example, the Change Working Hours action always prorates the amount. But if you deselect **Update salary if proposed salary is less than current salary**, any HR action that would result in a lower component amount can't default the lower component amount. People can still manually adjust the amount lower though.

## Global Compensation Settings for Defaulting Salary from Grade Ladder Rates

To specify the behavior of defaulting salary from grade ladder rates, use the grade step progression settings.

If the Redwood experience is enabled, use the Grade Step Progression Settings task. Otherwise use the Configure Global Settings task, where the relevant settings are in the Grade Step Progression section of the page.

### Update Salary If Proposed Salary Is Less Than Current Salary

During HR actions, such as Hire and Promote default salary amounts when proposed salary amounts are less than the current salary amounts. Also default salary amounts when proposed component amounts are less than the current component amounts.

Outcome Wanted	Salary Basis Type	Option to Select
Defaulted proposed salary amount can be less than the current salary amount	Salary amount is determined by user	Update salary if proposed salary is less than current salary
Defaulted simple component amount can be less than the current component amount	Salary amount is determined by simple components	

### Prevent Salary Default When Salary Record Exists with a Future Date

When there's a future record during HR actions, such as Change Assignment and Promote, default the salary or component amount. Control whether the amount defaults from the grade ladder when there's a future salary record, with the **Prevent salary default when salary record exists with a future date** setting. A salary record with a date after the transaction date is considered a future salary record.

- Enable the setting to prevent the salary from defaulting when there's a future salary record.
- Disable the setting to default the salary when there's a future salary record.

## When Salary Won't Default from the Grade Ladder

Salary won't default from the grade ladder rates in these situations:

- The proposed salary isn't greater than the current salary, when the salary basis configuration has salary amount determined by user
- The proposed component amount isn't greater than the current component amount, when the salary basis has salary amount determined by simple components
- A future salary exists
- The grade ladder configuration calculates salary using a formula
- The legislative data groups of the salary basis and the grade ladder aren't the same
- The currencies of the salary basis and the grade ladder aren't the same
- The grade ladder is missing the rate

Warning messages let you know when these situations occur. You can still manually update the amount and submit your HR action to update the salary.



# 19 Grade Step Progression Configuration

## Basic Process to Manage Grade Step Progression

To move people automatically from one grade, or grade and step, to the next level in a grade ladder, you can use grade step progression. Here's the basic process for managing the progression.

1. Optionally, create progression grade ladder groups using the `ORA_CMP_GSP_GRADE_LADDER_GRP` lookup. You can associate progression grade ladders with a group.
2. Create the progression grade ladder.
  - a. Configure the ladder and salary update details.
  - b. Add grades and steps.
  - c. Add progression rules at the ladder, grade, and step level.

You can also create and update progression grade ladders, with and without steps, using HCM Data Loader. Guidelines and examples for how to do this are in the HCM Data Loading Business Objects guide, Loading Compensation Objects chapter. You can also see Using HCM Spreadsheet Data Loader to Add Progression Attributes to Grade Ladders (document ID [2569831.1](#)).

3. Configure and submit the Run Grade Step Progression process to run according to your policies, such as daily, weekly, or monthly. You can configure the process to run for a single ladder or a group of ladders.
4. Review and accept or reject the progression process results. If you configured the process to automatically confirm progressions, then you won't need to accept them.

For information about troubleshooting issues, see Troubleshooting Grade Step Progression (document ID [2753020.1](#)).
5. Update progression grade ladder rates as appropriate, such as for new contracts.
6. Configure and submit the Synchronize Grade Step Rates process to run for a single ladder or a group of ladders.
7. Review and accept or reject the sync process results. If you configured the process to automatically confirm synchronizations, then you won't need to accept them.

For information about troubleshooting issues, see Troubleshooting Grade Step Progression (document ID [2753020.1](#)).

### Related Topics

- [Overview of Grade Step Progression Processing](#)
- [Overview of Proposed Progression and Salary Updates](#)
- [Basic Process to Default Salary Amounts from Grade Ladder Rates](#)
- [Create a Progression Grade Ladder for Batch Processing](#)
- [Guidelines for Loading Progression Rules](#)

## Create a Progression Grade Ladder for Batch Processing

Here's how you create a progression grader ladder to use with the Run Grade Step Progression and Synchronize Grade Step Rate processes. All the tasks you need are in the Compensation work area.

## Before you start

Make sure of the following:

- The group that you want to associate the ladder with exists. Selecting a group for the ladder is optional, but if needed, add the group to the ORA\_CMP\_GSP\_GRADE\_LADDER\_GRP lookup using the Lookups task.
- The grades exist. If needed, create them using the Grades task.
- The progression rules exist. If needed, create participant eligibility profiles using the Eligibility Profiles task.

## Here's what to do

### 1. Create the ladder.

- On the **My Client Groups > Compensation** page, click **Progression Grade Ladder**.
- On the Progression Grade Ladders page, click **Create Grade Ladder**.

Or you can duplicate an existing grade ladder. The Duplicate action ignores any historical and future versions of the ladder. It uses the version that's in effect on the date specified in your search criteria. For example, you've a grade ladder with three effective-dated versions: January 1, 1951, January 1, 2015, and January 1, 2021. You search for grade ladders using the date January 1, 2014. Since the January 1, 1951 ladder is effective then, that's the ladder that gets duplicated.

- On the Create Progression Grade Ladder page, Progression Ladder tab, complete the ladder details. Keep these key considerations in mind when making certain selections.

Field	Considerations
Grade Type	Specify whether the grade ladder has only grades or grades with steps. Your selection filters the Progression Increment drop-down list options.
Progression Increment	<p>When Grade Type is Grade, you can specify whether to evaluate only the next grade in the ladder or all grades.</p> <p>When Grade Type is Grade with step, you can specify how many steps to evaluate and whether to stop at the ceiling step.</p>
Transaction Date	Set the date for the updated assignment record created by the Run Grade Step Progression process. To make it the same date as the effective date of the process, select <b>Process run date</b> .
Confirmation Type	<p>To have people accept or reject proposed progressions as part of their review, select <b>Manual</b>.</p> <p>To have the Run Grade Step Progression process accept the proposals and updates as part of its processing, select <b>Automatic</b>.</p>
Assignment Action	If people leave the actions blank when they submit a process, it uses this action.
Grade Ladder Group	To include the ladder with other progression grade ladders in a single batch for progression processing, select the appropriate group.



- d. Complete the salary update details. Keep these key considerations in mind when making certain selections.

Field	Considerations
Include Salary Updates	<p>You're specifying how the Run Grade Step Progression process updates a person's assignment and salary records.</p> <ul style="list-style-type: none"> <li>- No (default): The process updates the grade or step value on the assignment, but not the salary amount.</li> <li>- Yes: The process updates the grade or step value on the assignment record. It also updates the salary record with the associated rate from the grade or step.</li> <li>- When you select <b>Yes</b>, you can configure more attributes related to salary updates and rate synchronization.</li> </ul>
Salary Calculation Method	To calculate salary using the rates from your progression grade ladder, select <b>Use grade step rate</b> .
Transaction Date	To use the assignment date as the date for the updated salary record the Run Grade Step Progression process creates, select <b>Grade step change date</b> .
Salary Adjustment Type	To prorate the rates from the grade ladder according to the person's assignment FTE value, select an adjustment type.

- e. Complete the rate synchronization details. Keep these key considerations in mind when making certain selections.

Field	Considerations
Transaction Date	<p>Set the date for the updated salary record created by the Synchronize Grade Step Rates process:</p> <ul style="list-style-type: none"> <li>- To make it the same date as the effective date of the process, select <b>Process run date</b>.</li> <li>- To make it the same date as when the rate changed on the grade ladder, select <b>Grade step rate change date</b>.</li> </ul>
Confirmation Type	<p>To have people accept or reject salary updates as part of their review, select <b>Manual</b>.</p> <p>To have the Synchronize Grade Step Rates process accept the proposals and updates as part of its processing, select <b>Automatic</b>.</p>

## 2. Add grades.

- On the Grades and Steps tab, Actions menu, select **Add Grade**.
- On the Add Grade dialog box, search for and select the grade to add. Your Grade Type selection decides which grades that you see in the list--basically, if the grades have steps or not.
- Enter the sequence for where to position the grade on the grade ladder.
- To see any existing steps, expand the grade. The **Expand** icon isn't present if no steps exist.
- Add a value for each step of the grade.

3. Add rules at the ladder, grade, and step levels.
  - a. Optionally, on the Progression Rules tab, in the Grade Ladder Rules section, add progression rules that apply to the entire grade ladder.
  - b. In the Grade Rules section, add the rule that applies to the grade. If the grades have steps, you might want to add rules at the step level rather than the grade level.
  - c. Optionally, add the progression rule that applies to a specific step.
  - d. Save your changes.
  - e. To add rules to the remaining grades in the ladder, repeat steps 2 through 4.
  - f. When you finish adding rules, save and close the progression grade ladder.
4. Validate the progression grade ladder by selecting **Validate** on the Actions menu. You need to fix any validation errors before your ladder processing of grade step progressions or rate synchronizations can include it.

#### Related Topics

- [Progression Grade Ladder Details Transaction Date](#)
- [Salary Update Details Transaction Date](#)
- [Rate Synchronization Details Transaction Date](#)
- [Overview of Grade Step Progression Processing](#)
- [Basic Process to Manage Grade Step Progression](#)

## Progression Increment Options in Grade Step Progression

The Run Grade Step Progression process uses progression rules to move eligible people to a higher grade or step. You determine how the process evaluates the progression rules with the progression increment that you select.

### Grade

These increment options are available after you set Grade Type to **Grade**.

Progression Increment	The Grades and Steps Evaluated for Progression
Grade	The process evaluates all grades above the current grade, up to the last grade in the grade ladder. It places the person on the lowest grade that the progression rules decide they're eligible for.
Next grade in grade ladder	The process only evaluates one grade, the one above the current grade.

### Grade with Steps

These increment options are available after you set Grade Type to Grade with steps.

Progression Increment	The Grades and Steps Evaluated for Progression	Ceiling Step
Grade and step	The process evaluates all steps above the current step, up to the last step in the grade ladder. It places the person on the lowest step that the progression rules decide they're eligible for.	The process ignores the ceiling step.
All steps in grade, stop at ceiling	The process evaluates all steps in the grade above the current step, up to and including the ceiling step. It places the person on the lowest step that the progression rules decide they're eligible for.	If the assignment is at or above the ceiling step, the process doesn't evaluate it for progression.
Next step in grade, stop if ceiling	The process only evaluates one step: the one above the current step.	If the assignment is at or above the ceiling step, the process doesn't evaluate it for progression.
Next step in grade ladder	The process only evaluates one step: the one above the current step.	The process ignores the ceiling step.

#### Related Topics

- [Overview of Grade Step Progression Processing](#)
- [Propose Progression and Salary Update According to Eligibility](#)
- [Update Salary According to New Progression Grade Ladder Rates](#)

## Examples of Adding Progression Rules

You can enable or restrict progression between grades and steps using progression rules. You configure the rules using the Eligibility Profiles task.

For progression rules, you want to create participant profiles with either the Global or Compensation usage. You associate these rules with progression grade ladders using the Progression Grade Ladder task.

These scenarios show at what level you apply various rules to enable or restrict progression.

### Minimum Time Required to Progress

You want factory workers to progress automatically through steps. You create a progression grade ladder with step-level rules that define how much time needs to elapse between progressions. Here's how you apply the rules in the ladder.

Rule Level	Example Rule
Ladder: Western Region Manufacturing	None
Grade: Job Assembly II	None
Step 1	6 Months in a Step
Step 2	6 Months in a Step
Step 3	6 Months in a Step

## Performance Rating Required to Progress

You want administrative workers to progress to the next grade level only if their performance evaluation meets or exceeds expectations. You create a progression grade ladder where the final step for each grade includes a progression rule that evaluates worker performance. Here's how you apply the rules in the ladder.

Position	Example Rule
Ladder: Support Services	None
Grade: Administrative Clerk I	None
Step 1	6 Months in a Step
Step 2	6 Months in a Step
Step 3	6 Months in a Step Meets or Exceeds Evaluation

## Certification Required to Progress

You don't want programmers to progress to the next step, unless they've a technical certificate. You create a progression grade ladder that requires a certificate to progress to the next step. Here's how you apply the rules in the ladder.

Position	Example Rule
Ladder: Software Developers	None
Grade: Programmer III	None
Step 1	Java SE Fundamentals Certificate
Step 2	Java SE Advanced Certificate
Step 3	Java SE Optimization Certificate

### Related Topics

- [Eligibility Profiles](#)

# 20 Transaction Dates and On Eligibility in Grade Step Progression Processing

## Progression Grade Ladder Details Transaction Date

The Run Grade Step Progression process sets the start date of the updated assignment. It uses the specified Transaction Date option in the Progression Grade Ladder Details section of the Progression Grade Ladder page.

Here's how each option affects the start date of an updated assignment.

Option	Start Date the Process Sets for the Updated Assignment
Process run date	The effective date set when you submit the Run Grade Step Progression process.
On eligibility	The date in the specified evaluation period when the person met the eligibility criteria. Details are available in the On Eligibility Option for Grade Step Transaction Date topic.
Start of next month	The day 1 of the month after the effective date. For example, if the effective date of the process is January 15, 2021, the start of next month date is February 1, 2021.
Start of next pay period	The first day of the pay period beginning after the effective date. For example, your pay periods are from 1 to 15 and 16 to 30 each month. If the effective date of the process is January 15, 2021, the start of next pay period date is January 16, 2021.
Start of current pay period	The first day of the pay period that includes the effective date. For example, your pay periods are from 1 to 15 and 16 to 30 each month. If the effective date of the process is January 15, 2021, the start of current pay period date is January 1, 2021.
Use formula	The date returned by the specified formula.

### Related Topics

- [Effective and Transaction Dates in Grade Step Progression Processing](#)
- [On Eligibility Option for Grade Step Transaction Date](#)
- [Overview of Grade Step Progression Processing](#)
- [Run Grade Step Progression Process](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## On Eligibility Option for Grade Step Transaction Date

When Transaction Date is On eligibility, the update assignment date is the actual date in the specified period when the person met the eligibility criteria.

Specify the period using the Effective Date and parameters for the eligibility look-back period when you submit or schedule the Run Grade Step Progression process.

## Specify the Period

To run the process for a specific evaluation period, set the end date of the period by selecting an effective date. Set the start date of the period by selecting an eligibility evaluation start date. For example, you want the process to evaluate eligibility for all dates from August 2 through 15, 2021. You set Effective Date to August 15, 2021 and Eligibility Evaluation Start Date to August 2, 2021. For a person who meets the eligibility criteria on August 2, the process sets the assignment transaction date to August 2, 2021. For a person who meets the eligibility criteria on August 3, it sets the date to August 3, 2021. And it continues this way, up to and including August 15.

## Have the Process Decide the Period

To run the process on a schedule, leave the effective date blank. This way each instance of the process can set the effective date to the system date when it runs. Set Days Back from Effective Date to the appropriate numeric value so the process can calculate a start date each time it runs. For example, you want to run the process every 2 weeks just before the biweekly payroll run. To specify an evaluation period that covers the 2-week period since the process last ran, set Days Back from Effective Date to 13. When it runs, the process subtracts 13 days from the effective date to get the start date of the evaluation period. When the process runs on August 15, it sets Effective Date to August 15, 2021. It then calculates that the evaluation period starts on August 2, 2021.

The maximum evaluation period is 40 days. You can evaluate eligibility for a longer period by breaking your process up into multiple periods that are shorter than 40 days.

## When Eligible Before the Evaluation Period Start Date

When people meet the eligibility criteria before the evaluation period start date, the process sets their assignment start dates to the period start date. For example, the evaluation period is August 2 through 15, 2021, but a person met the eligibility criteria on July 31, 2021. The process sets their assignment start date to August 2, 2021. For the process to set the person's assignment start date to July 31, 2021, the evaluation period would need to include July 31.

### *Related Topics*

- [Batch Settings for Grade Step Progression Processing](#)
- [Effective and Transaction Dates in Grade Step Progression Processing](#)
- [Run Grade Step Progression Process](#)
- [Synchronize Grade Step Rate Process](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## On Eligibility and Processing That Includes Future-Dated Assignments or Salaries

Settings for batch error conditions can prevent the processing of grade step progressions when a future-dated assignment or salary exists. If Transaction Date is On eligibility, the future-dated assignment or salary can be relative to any dates of the process evaluation period.

For example, the process is evaluating progression for dates from August 2 through 15, 2021 and finds a person with an assignment dated August 3. Even though the process effective date is August 15, the process considers the assignment

a future-dated assignment. That's because the assignment date is after the evaluation period start date of August 2 and thus has a future date.

#### Related Topics

- [On Eligibility Option for Grade Step Transaction Date](#)
- [Batch Settings for Grade Step Progression Processing](#)
- [Effective and Transaction Dates in Grade Step Progression Processing](#)
- [Overview of Grade Step Progression Processing](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## Salary Update Details Transaction Date

The Run Grade Step Progression process sets the start date of the updated salary. It uses the specified Transaction Date option in the Salary Update Details section of the Progression Grade Ladder page.

Here's how each option affects the start date of an updated salary.

Option	Start Date the Process Sets for the Updated Assignment
Grade step change date	The same date used for the assignment, which is the Transaction Date value selected in the Progression Grade Ladder Details section.
Start of next month	The day 1 of the month after the effective date. For example, if the effective date of the process is January 15, 2021, the start of next month date is February 1, 2021.
Start of next pay period	The first day of the pay period beginning after the effective date. For example, your pay periods are from 1 to 15 and 16 to 30 each month. If the effective date of the process is January 15, 2021, the start of next pay period date is January 16, 2021.
Start of current pay period	The first day of the pay period that includes the effective date. For example, your pay periods are from 1 to 15 and 16 to 30 each month. If the effective date of the process is January 15, 2021, the start of current pay period date is January 1, 2021.
Use formula	The date returned by the specified formula.

#### Related Topics

- [Effective and Transaction Dates in Grade Step Progression Processing](#)
- [Overview of Grade Step Progression Processing](#)
- [Run Grade Step Progression Process](#)
- [Synchronize Grade Step Rate Process](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## Salary Start Date Exceptions for Rate Synchronization Transaction Dates

The Synchronize Grade Step Rates process sets the salary start date using the transaction date.

Sometimes the salary start date calculated from the transaction date is before the date the person moved to their current step or grade. This can happen when the rate synchronization details Transaction Date is one of these options:

- Grade step rate change date
- Start of current pay period
- Use formula

When the calculated date is before the current step or grade date, the process sets the salary start date to the person's current assignment. The process identifies the current assignment using the effective date. Thus the assignment it finds might not be the assignment with the latest start date.

For example, your Transaction Date is Grade step rate change date and you updated your rate values effective January 1, 2021. On February 2, 2021, a person moved from step 4 to step 5. You run the process with an effective date of February 2, 2021, which the process uses to find the person's current assignment. The process identifies that the person is on step 5, so it updates the person's salary with the new rate for step 5. Usually, the process would set the start date of the updated salary according to the transaction date setting. In this example, that date is the effective date of the updated rate values, January 1, 2021. But that start date doesn't make sense for this person, who moved to the new step on February 2, 2021. You wouldn't want to update their rate for step 5 even a day before they moved to the step. So, the process sets the salary start date to the start date of the assignment the process identified is current, February 2, 2021.

### Related Topics

- [Effective and Transaction Dates in Grade Step Progression Processing](#)
- [Overview of Grade Step Progression Processing](#)
- [Synchronize Grade Step Rate Process](#)
- [Run Grade Step Progression Process](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## Rate Synchronization Details Transaction Date

The Synchronize Grade Step Rates process sets the start date of the updated salary. It uses the specified Transaction Date option in the Rate Synchronization Details section of the Progression Grade Ladder page.

Here's how each option affects the start date of an updated salary.

Option	Start Date the Process Sets for the Updated Assignment	Possible Exception
Process run date	The effective date set when you submit the Synchronize Grade Step Rates process.	None



Option	Start Date the Process Sets for the Updated Assignment	Possible Exception
Grade step rate change date	The start date of the rate value on the progression grade ladder.	Salary start dates
Start of next month	The day 1 of the month after the effective date. For example, if the effective date of the process is <b>January 15, 2021</b> , the start of next month date is <b>February 1, 2021</b> .	Salary end dates
Start of next pay period	The first day of the pay period beginning after the effective date. For example, your pay periods are from 1 to 15 and 16 -- 30 each month. If the effective date of the process is <b>January 15, 2021</b> , the start of next pay period date is <b>January 16, 2021</b> .	Salary end dates
Start of current pay period	The first day of the pay period that includes the effective date. For example, your pay periods are from 1 to 15 and 16 -- 30 each month. If the effective date of the process is <b>January 15, 2021</b> , the start of current pay period date is <b>January 1, 2021</b> .	Salary start dates
Use formula	The date returned by the specified formula.	Salary start and end dates

#### Related Topics

- [Salary Start Date Exceptions for Rate Synchronization Transaction Dates](#)
- [Salary End Date Exceptions for Rate Synchronization Transaction Dates](#)
- [Effective and Transaction Dates in Grade Step Progression Processing](#)
- [Synchronize Grade Step Rate Process](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## Salary End Date Exceptions for Rate Synchronization Transaction Dates

The Synchronize Grade Step Rates process sets the salary start date using the transaction date.

Sometimes the salary start date calculated from the transaction date is after the date the person moved out of the current step or grade. This can happen when the rate synchronization details Transaction Date is one of these options:

- Start of next month
- Start of next pay period
- Use formula

When the calculated date is after the move date, the process excludes the assignment from processing. The process identifies the current assignment using the effective date. Thus the assignment it finds might not be the assignment with the latest start date.

For example, your Transaction Date is Start of next month. On June 1, 2021, a person moved to step 2. They then moved to step 3 on July 15, 2021. When you run the process with an effective date of July 1, 2021, it sets the person's salary start date to August 1, 2021. The process also uses the effective date to identify that the person's current assignment is the June 1 assignment. It doesn't make sense to update the August 1 salary with the step 2 rate however, because they aren't on that step on August 1. So the process excludes the June 1 assignment from processing. When you run the process with an effective date on or after July 15, 2021, it updates the rate value for the person's July 15 assignment.

#### *Related Topics*

- [Effective and Transaction Dates in Grade Step Progression Processing](#)
- [Overview of Grade Step Progression Processing](#)
- [Run Grade Step Progression Process](#)
- [Synchronize Grade Step Rate Process](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

# 21 Global Settings for Grade Step Progression Processing

## Batch Settings for Grade Step Progression Processing

To specify the behavior of batch processes, use the grade step progression settings.

If the Redwood experience is enabled, use the Grade Step Progression Settings task. Otherwise use the Configure Global Settings task, where the relevant settings are in the Grade Step Progression section of the page.

### Maximum Eligibility Look-Back Days

To limit the start of the date range when Grade Step Transaction Date is On eligibility, set a numeric value for Maximum Eligibility Look-Back Days. This value limits the Eligibility Evaluation Start Date and Days Back from Effective Date values people can set on the Run Grade Step Progression page. The default value is 40, meaning that the start date can be 40 days before the effective date. You can enter any number between 0 and 40.

### Proposed Salary Less Than or Equal to Current Salary

There are three options for handling salary updates when the proposed salary isn't more than the current salary. Use the Proposed Salary Less Than or Equal to Current Salary configuration option to decide the behavior.

- To see an error message when the proposed salary isn't greater than the current salary, select **Error**.
- To update the assignment but not the salary, when the proposed salary is less than or equal to the current salary, select **Update assignment** only.
- To update the assignment and salary when the proposed salary is less than or equal to the current salary, select **Update assignment and salary**.

### Include Assignments in Only Synchronize Grade Step Rates Processes

By default, excluding an assignment from the Run Grade Step Progression process also excludes it from the Synchronize Grade Step Rates process. To include all assignments in only the Synchronize Grade Step Rates process, deselect **Exclude assignment from synchronize rate process if excluded from grade step progression process**.

#### *Related Topics*

- [Effective and Transaction Dates in Grade Step Progression Processing](#)

## Batch Error Conditions for Assignment Date in Grade Step Progression Processing

To configure error conditions in grade step progression that relate to the assignment date, use the grade step progression settings.

If the Redwood experience is enabled, use the Grade Step Progression Settings task. Otherwise use the Configure Global Settings task, where the relevant settings are in the Grade Step Progression section of the page.

### Allow Multiple Step Updates on Same Date

You can let the Run Grade Step Progression process make a step update on the same date as an existing assignment record. To do this, deselect the **Error when grade step record exists with the same date** option.

You can review salary information on the Review Proposed Progressions and Salary Updates page. There you see the current and proposed values. And you see the same Effective Start Date value for both the current and proposed step.

If you do enable multiple updates, the processes update the existing row with the new information and a new sequence. You don't see the historical step attribute when you view older records for assignment rows with the same date. History gets maintained for all the attributes that the assignment record stores. But, the grade step record for the assignment stores only the most recent step attribute. So, history doesn't get maintained for the grade step attribute of the assignment because older values were overwritten.

### Allow Progressions When Future Assignment Exists

You can allow progressions when future assignment changes exist using these settings:

- Error when assignment record exists with a future date
- Error when a future-dated grade step or a change that end-dates the grade step exists

You've several options for handling progressions when future assignment changes exist:

- You can prevent progression when there's any type of future-dated assignment and show an error message.
- You can allow progression only if the future-dated assignment doesn't include a change to the grade step. Examples of this type of change include changes to location, working hours, manager, or future employment termination. In this case, people see an error message when the future-dated assignment changes the grade step. Otherwise, the process allows the progression.
- You can allow progression when an assignment record exists with a future date. You can also allow it when a future-dated grade step or change that end dates the grade step exists. If the future assignment includes a step change, the newly inserted assignment is valid only until the start date of the future-dated assignment.

For example, a person has a current assignment dated Jan 1, 2022 with Grade 1, step 1. They also have another, future-dated assignment dated March 1, 2022 with Grade 1, step 4. Someone runs the process effective February 1, 2022 and it updates the current assignment to Grade 1, step 2 with a start date of February 1, 2022. The future-dated March 1, 2022 assignment remains at Step 4. So the newly inserted assignment grade step with the start date of February 1, 2022 has an end date of February 28, 2022.

It's important to prevent data corruption where the assignment grade step doesn't match the grade in the parent assignment record. So grade progressions can happen only when the future-dated assignment has a grade step record

on the same date. For example, a person has a current assignment dated Jan 1, 2022 with Grade 1, step 6 and another, future-dated assignment dated March 1, 2022. The future-dated assignment is a location change. Someone runs the process effective February 1, 2022. Because the step didn't change on March 1, 2022, there isn't a grade step record effective March 1, only an assignment dated March 1, 2022.

Now, the person is eligible to move to Grade 2, step 1--a grade progression. But, if the process inserts an assignment dated Feb 1, 2022 with Grade 2, step 1, the grade step record for that assignment is effective until end-of-time. The problem is that the March 1 (future-dated) assignment would revert the assignment to Grade 1. But the assignment would inherit the Feb 1, 2022 step 1 that belongs to Grade 2. This would cause a data corruption for the March 1 assignment row. So if this condition exists, people see an error message.

Deselect the relevant error options to allow the updates and progressions.

## What Happens If You Deselect Both the Assignment Record Error and Grade Step Error

- The processes allow a step progression for all types of existing future-dated assignments, including these:
  - Future-dated transfer that includes a step change
  - Future-dated progression to a new step within the grade
  - Future-dated manager change
  - Future-dated employment termination
  - Future-dated location change
- The processes also allow a grade progression as long as the future-dated assignment has a corresponding grade step record on the same date.

## What Happens If You Deselect the Assignment Record Error and Select the Grade Step Error

- The processes allow a step progression for the types of existing future-dated assignments that don't have a step change, including these:
  - Future-dated manager change
  - Future-dated employment termination
  - Future-dated location change
- The processes don't allow grade progression if there's a future-dated assignment.

### *Related Topics*

- [Overview of Grade Step Progression Processing](#)
- [Overview of Proposed Progression and Salary Updates](#)
- [Overview of Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates](#)
- [Basic Process to Manage Grade Step Progression](#)

## Batch Error Conditions for Salary Date in Grade Step Progression Processing

To configure error conditions in grade step progression that relate to the salary date, use the grade step progression settings.

If the Redwood experience is enabled, use the Grade Step Progression Settings task. Otherwise use the Configure Global Settings task, where the relevant settings are in the Grade Step Progression section of the page.

You can specify if these processes should generate errors when they find an existing salary record with the same or future date.

- Run Grade Step Progression
- Synchronize Grade Step Rates

These settings don't affect any change to the grade ladder, grade, or step during an HR action, such as **Hire**, **Promote**, or **Transfer**. They only affect the behavior of the batch processes. They also don't affect date handling in HR actions.

### Updates to Existing Record with the Same Date

If you enable updates to a salary record that exists on the same date, you're correcting the existing salary record.

- The new salary amount might be greater or less than the existing salary amount.
- The new salary amount can't be less than the salary amount that exists on a prior date. If this situation occurs, you get an error message.
- When viewing the details on the Review Proposed Progressions and Salary Updates page, you see the current salary details. These details reflect the values of the existing salary record for the same date, that's the record getting corrected.

### Updates When Future-Dated Records Exist

If you enable updates to a salary record when future-dated records exist, you're inserting a new record in the middle of the historical sequence.

- The salary amount for the inserted salary record might be greater or less than any salary amounts in future-dated records.
- The salary amount for the inserted salary record can't be less than the salary amount on the record that exists on the previous date. If this situation occurs, you get an error message.
- When viewing the details on the Review Proposed Progressions and Salary Updates page, you see the current salary details. These details reflect the prior salary record, that's the record with an effective date before the effective date of the record getting inserted.

*Related Topics*

- [Overview of Grade Step Progression Processing](#)
- [Overview of Proposed Progression and Salary Updates](#)
- [Overview of Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates](#)
- [Basic Process to Manage Grade Step Progression](#)





# 22 Grade Step Progression Processing

## Overview of Grade Step Progression Processing

You can change people's assignment and salary records according to rates and rules associated with a progression grade ladder. You do this using two batch processes: Run Grade Step Progression and Synchronize Grade Step Rates.

## Run Grade Step Progression Process

To identify the assignments that are eligible to progress to a new grade or step, you run the Run Grade Step Progression process. Typically, you schedule this process to run regularly, according to your policies.

For example, you run it every Friday.

January 2020							February 2020							March 2020						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3							1	1	2	3	4	5	6	7
5	6	7	8	9	10	11	2	3	4	5	6	7	8	8	9	10	11	12	13	14
12	13	14	15	16	17	18	9	10	11	12	13	14	15	15	16	17	18	19	20	21
19	20	21	22	23	24	25	16	17	18	19	20	21	22	22	23	24	25	26	27	28
26	27	28	29	30	31		23	24	25	26	27	28	29	29	30	31				

The process evaluates each assignment associated with the ladder. It uses the eligibility criteria in the progression rules for the higher steps and grades. If the process decides that the assignment meets the eligibility criteria, then the assignment is eligible to progress to that grade or step. It's also eligible for the associated salary changes.

You can set a specific effective date or leave the effective date blank. If you don't set a date, the process uses the system date at runtime.

### Related Topics

- [Propose Progression and Salary Update According to Eligibility](#)
- [Overview of Proposed Progression and Salary Updates](#)
- [How You Include an Assignment in Grade Step Progression Processing](#)
- [Batch Settings for Grade Step Progression Processing](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## Synchronize Grade Step Rate Process

To change people's salary records after the underlying rates for the grades or steps change, you run the Synchronize Grade Step Rates process. Typically, you run this process manually, once or twice a year.

For example, your organization approves new contracts the last Monday in January and July, and you sync the grade step rates that Friday.

January 2020							February 2020							March 2020						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
			1	2	3	4							1	1	2	3	4	5	6	7
5	6	7	8	9	10	11	2	3	4	5	6	7	8	8	9	10	11	12	13	14
12	13	14	15	16	17	18	9	10	11	12	13	14	15	15	16	17	18	19	20	21
19	20	21	22	23	24	25	16	17	18	19	20	21	22	22	23	24	25	26	27	28
26	27	28	29	30	31		23	24	25	26	27	28	29	29	30	31				

April 2020							May 2020							June 2020						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
			1	2	3	4						1	2		1	2	3	4	5	6
5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13
12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27
26	27	28	29	30			24	25	26	27	28	29	30	28	29	30				
							31													

July 2020							August 2020							September 2020						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
			1	2	3	4							1			1	2	3	4	5
5	6	7	8	9	10	11	2	3	4	5	6	7	8	6	7	8	9	10	11	12
12	13	14	15	16	17	18	9	10	11	12	13	14	15	13	14	15	16	17	18	19
19	20	21	22	23	24	25	16	17	18	19	20	21	22	20	21	22	23	24	25	26
26	27	28	29	30	31		23	24	25	26	27	28	29	27	28	29	30			
							30	31												

The process applies the new rates to the existing salary records for everyone whose assignment is associated with the progression grade ladder.

#### Related Topics

- [Update Salary According to New Progression Grade Ladder Rates](#)
- [Overview of Proposed Progression and Salary Updates](#)
- [Batch Settings for Grade Step Progression Processing](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## How You Include an Assignment in Grade Step Progression Processing

Use the Include in Grade Step Progression attribute on the assignment to include or exclude an assignment from the Run Grade Step Progression process. Also use this attribute to exclude assignments from the Synchronize Grade Step Rates process.

Select the **Exclude assignment from synchronize rate process if excluded from grade step progression process** option. If the Redwood experience is enable, the option is on the Grade Step Progressions Settings page. Otherwise, it's on the Configure Global Settings page.

- Here's what happens if you select the **Exclude assignment from synchronize rate process if excluded from grade step progression process** option.
  - If the assignment attribute Include in grade step progression is Y, both processes include the assignment.
  - If the assignment attribute Include in grade step progression is N, both processes exclude the assignment.
- Here's what happens if you deselect the **Exclude assignment from synchronize rate process if excluded from grade step progression process** option.
  - If the assignment attribute Include in grade step progression is Y, both processes include the assignment.
  - If the assignment attribute Include in grade step progression is N, the Run Grade Step Progression process excludes the assignment. And the Synchronize Grade Step Rates process includes it.
- To update the assignment attribute using HCM Data Loader or HCM Spreadsheet Data Loader, select the **GspEligibilityFlag** attribute.
  - Valid values are Y and N.
  - The Grade Step Progression process interprets any value other than N as Y.

The Review page Error tab lists excluded assignments along with an informational message indicating that the process didn't include the assignment.

There are more filtering options on the Run Grade Step Progression page. They let you include assignments based on legal employer, business unit, location, department, or payroll. Both processes include an option to run for an individual person or using a person selection formula.

#### *Related Topics*

- [Batch Settings for Grade Step Progression Processing](#)

## How You Include Multiple Progression Grade Ladders in a Process

To include multiple progression grade ladders in a Run Grade Step Progression or Synchronize Grade Step Rates process, set Batch Type to **Grade ladder** group. Then select the specific group to use.

For example, you want to run grade step progression or sync rates for all ladders in the North region. So, you select your **North Region** grade ladder group.

#### *Related Topics*

- [Overview of Proposed Progression and Salary Updates](#)

## Assignment and Salary Actions in Grade Step Progression Processing

When you run the Run Grade Step Progression and Synchronize Grade Step Rates processes, specify the actions to use for the updated assignment and salary.

You can either use automated grade step progression or leave the action blank. If you leave it blank, the process uses the assignment action from the progression grade ladder for both the assignment and salary actions.

### *Related Topics*

- [Actions for Manual Progression and Synchronization Processes](#)
- [Overview of Proposed Progression and Salary Updates](#)
- [Global Compensation Settings for Defaulting Salary from Grade Ladder Rates](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## Frequency in Grade Step Progression Processing Results

The process automatically converts the salary amount from the progression grade ladder frequency to the salary basis frequency, as appropriate.

For example, the proposed salary from the grade ladder is 3000 USD per month and the person's salary basis has an annual frequency. The process converts the proposed salary to 36,000 USD annually.

### *Related Topics*

- [Overview of Proposed Progression and Salary Updates](#)
- [Global Compensation Settings for Defaulting Salary from Grade Ladder Rates](#)
- [Create a Progression Grade Ladder for Batch Processing](#)

## Effective and Transaction Dates in Grade Step Progression Processing

The Run Grade Step Progression and Synchronize Grade Step Rates processes use both effective dates and transaction dates.

## Effective Date

The processes use the specified effective date to select the person's current grade and step, their current salary, and the appropriate grade ladder rate. For example, you run a process with an effective date of January 1, 2021.

- The process uses the assignment with a date that's before or on January 1, 2021 to find the person's current grade and step. The grade comes from the assignment. And the step comes from the grade step of the child assignment.
- The process uses the salary with a date that's before or on January 1, 2021 to find the person's current salary.
- The process uses the progression grade ladder with an effective date before or on January 1, 2021 to find the rate to use for the proposed salary.

## Transaction Date

The processes use the grade step, salary, and rate synchronization transaction dates in the progression grade ladder to set start dates.

### *Related Topics*

- [Progression Grade Ladder Details Transaction Date](#)
- [Salary Update Details Transaction Date](#)
- [Rate Synchronization Details Transaction Date](#)
- [Salary Start Date Exceptions for Rate Synchronization Transaction Dates](#)
- [Salary End Date Exceptions for Rate Synchronization Transaction Dates](#)

## Grade Step Progression Transaction Log

You can opt to create a transaction report when you submit the Run Grade Step Progression or Synchronize Grade Step Rates processes. The text file contains detail for all the transactions and specifies error conditions found during processing.

Here's how you generate the report:

1. While setting up either batch process, select the **Create transaction report** check box.
2. Submit the process.

After the process completes, you can view the log and output files. These files are attachments for the completed process.

## Tips and Considerations

- The transaction log isn't translated to other languages; field labels and column headers appear in only English.
- Field formats, such as date and currency format, are fixed for all users and don't conform to format preferences for the person who generates the report.
- The text file includes over twenty-five columns of data for each record. You might find it helpful to import the file into a spreadsheet for easier viewing and to filter or sort the data. The columns are delimited by the pipe symbol ( | ), which you can use to align the columns in a spreadsheet.



# 23 Examples of Grade Step Progression Processing

## Propose Progression and Salary Update According to Eligibility

You can change people's assignment and salary records according to rules linked to a progression grade ladder. Here's how various progression grade ladder configurations affect Run Grade Step Progression processing results. These processing conditions apply for all increment options.

- If a single grade or step has more than one progression rule, the person must meet the criteria in all progression rules.
- If a grade or step doesn't have an associated eligibility profile, then all assignments are eligible to progress to that grade or step.
- If an assignment meets the criteria for more than one grade or step, the process proposes to move the person to the lowest eligible steps. You see a warning message when you review the processing results.

### Progression Increment Is Grade and Step

Scenario: A person is on the Midwest Hourly progression grade ladder at Grade A, Step 1. The ladder has five grades: (A, B, C, D, and E), and each grade has four steps. The progression increment is Grade and step.

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

### Progression Increment Is All Steps in Grade, Stop at Ceiling

Scenario: A person is on the Midwest Hourly progression grade ladder at Grade A, Step 1. The ladder has five grades: (A, B, C, D, and E), and each grade has four steps. The ceiling step for Grade A is Step 3. The progression increment is All steps in grade, stop at ceiling.

Results: The process checks the progression rules associated with Grade A, Step 2 to decide if the person is eligible to move up to Step 2. Then, it checks Step 3. It won't check Step 4, because Step 4 is above the ceiling step for Grade A. And, it won't check any of the grades above Grade A.

### Progression Increment Is Next Step in Grade, Stop If Ceiling

Scenario: A person is on the Midwest Hourly progression grade ladder at Grade A, Step 1. The ladder has five grades: (A, B, C, D, and E), and each grade has four steps. The ceiling step for Grade A is Step 3. The progression increment is Next step in grade, stop if ceiling.

Results: The process checks the progression rules associated with Grade A, Step 2 to decide if the person is eligible to move up to Step 2. It won't check any steps above Step 2 because this progression increment only evaluates the one step above the current step.

## Progression Increment Is Next Step in Grade Ladder

Scenario: A person is on the Midwest Hourly progression grade ladder at Grade A, Step 4. The ladder has five grades: (A, B, C, D, and E), and each grade has four steps. The ceiling step for Grade A is Step 3. The progression increment is Next step in grade ladder.

Results: The process checks the progression rules associated with Grade B, Step 1 to decide if the person is eligible to move to Grade B, Step 1. It won't check any grades or steps above Grade B, Step 1.

### *Related Topics*

- [Progression Increment Options in Grade Step Progression](#)
- [Overview of Grade Step Progression Processing](#)

## Update Salary According to New Progression Grade Ladder Rates

You can change people's assignment and salary records according to rates linked to a progression grade ladder. Here's how configuration changes to the progression grade ladder affect Synchronize Grade Step Rates processing results.

### Scenario

Scenario: A person is on the Midwest Hourly progression grade ladder at Grade A, Step 4 as of their hire date. The salary for this step is 30 USD per hour. On January 1, 2020, the rates for the Midwest Hourly ladder increased and now Step 4 has a rate of 35 USD per hour.

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

### *Related Topics*

- [Overview of Grade Step Progression Processing](#)
- [Overview of Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates](#)



# 24 Proposed Grade Step Progression and Salary Updates

## Overview of Proposed Progression and Salary Updates

Access the results of a Run Grade Step Progression or Synchronize Grade Step Rates process from the Review Proposed Progressions and Salary Updates page.

When you search on a grade ladder group, you see all grade ladders belonging to that group. It doesn't matter if the process ran by grade ladder group or by individual grade ladder. This gives you the flexibility to run or rerun the process for a single grade ladder. You can still see the results for that grade ladder when viewing results for the entire grade ladder group.

To see who has proposed progressions and the corresponding statuses, click the appropriate process name. The people you see depends on your data security permissions. You can also view any errors that occurred.

To align with times on the process scheduling and monitoring pages, the submission time is in the UTC time zone.

## Statuses for Grade Step Processes

You can see these statuses on the Results page, Updates tab after running the Run Grade Step Progression and Synchronize Grade Step Rates processes.

Status	Description
Accepted	The process applied the proposed progressions and salary updates to the assignment and salary records. You can't change this status.
Not Processed	The process evaluated the progression and decided that the person is eligible to move to the new grade or step. A person still needs to accept or reject the proposal.
Failed	The service that was writing the update to the assignment or salary record had a problem. To try to make the update manually, you can click <b>Accept</b> .
Suspended	Older batch process results that contain rows that were in Not Processed status when a later process ran have this processing status. You can no longer accept or reject these proposals in the older run.
Rejected	Someone stopped the process from applying the proposed updates to the person's records. For example, you might reject a proposed progression and manually adjust it because the person is eligible for multiple steps in the grade.

### Related Topics

- [Overview of Proposed Progression and Salary Updates](#)

## Actions for Manual Progression and Synchronization Processes

You've actions available only if the confirmation type for the progression grade ladder or rate synchronization is Manual.

You can accept the updates for people individually or as a group. Accepting a proposed progression and salary update immediately makes these changes for the selected people:

- Adds a new grade or step to the person's assignment
- Adds a new salary amount to the person's salary record

You can reject proposed progressions and salary updates for people individually or as a group. You can also reject proposed progressions and salary updates for selected people in a group, and then accept updates for the remaining people. If you reject a proposal and then change your mind, you can undo the rejection and set the proposal status back to Not Processed.

If some time passes before you review the proposed updates, the underlying data might have changed. To catch any new problems, some validations run again when you manually accept the progressions and salary updates. If you change the person's assignment or salary record after the process ran, you might see an error message in situations like these:

- You add a future-dated salary record, and your configuration setting doesn't allow updates when future-dated salary records exist.
- You add a salary record for the same date as the proposed salary. But your configuration doesn't allow updates when a salary record exists on the same date.
- You add a future-dated assignment.
- You add a grade step record for the same date as the proposed progression. But your configuration doesn't allow updates when a grade step record exists on the same date.
- You change the person's salary basis.

For example, you ran the process with Confirmation Type set to Manual and there were no errors for this person. A proposed progression and salary update exists for June 25. After the process completed, you added a salary record dated July 1. You come to the Review Proposed Progressions and Salary Updates task and use the Accept action to update the person's assignment and salary record. Now, because the underlying data changed, you see the error showing that the proposal can't happen because there's a future-dated salary record.

### *Related Topics*

- [Overview of Proposed Progression and Salary Updates](#)

## How You Can Handle Progression Processing Errors

You can review any errors that occurred during progression processing on the Results page, Errors tab. You fix the proposed progressions and salary changes with errors outside of the grade step progression process.

Here are some possible processing errors:

- 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.
- A step update exists on the same date.

## Reference

For more information about troubleshooting grade step progression issues, see Troubleshooting Grade Step Progression (document ID [2753020.1](#)).

### *Related Topics*

- [Overview of Proposed Progression and Salary Updates](#)
- [Overview of Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates](#)



# 25 Adjustments to Salary Amounts in Proposed Progression and Salary Updates

## Overview of Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates

The current and proposed salary amounts that you see when reviewing processing results of grades step progression depend on either or both of these parameters:

- The rounding rules of the person's salary basis
- The salary adjustment type of the person's progression grade ladder

You can review current and proposed salary amounts using the Review Proposed Progressions and Salary Updates task on the **My Client Groups > Compensation** page.

### *Related Topics*

- [Overview of Grade Step Progression Processing](#)

## How Rounding Rules Affect Salary Amounts for Proposed Progression and Salary Updates

A salary basis might have rounding rules for salary amount and annualized amounts. If it does, progression processing rounds the calculated salary amount according to that rule when it converts the salary from one frequency to another.

For example, the process rounds the amount when it updates a salary record with a monthly salary basis using hourly rates from a grade ladder.

Progression processing also rounds the annual salary and annualized full-time salary amounts. It calculates and stores the annual amounts during the batch run. You see these annual amounts in the process results only for reference. The process doesn't include the annual amounts on the salary record. The salary record dynamically calculates the annual amounts that you see, so you might occasionally see differences in annual values. For example, the annual amounts are different on the salary page if the rounding rules change after you run the grade step progression process.

### *Related Topics*

- [Overview of Grade Step Progression Processing](#)
- [Overview of Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates](#)

# How the Salary Adjustment Type Affects Salary Amounts for Proposed Progression and Salary Updates

When you view the processing results of grade step progression for a specific person, you can see the current and proposed full-time salary amounts.

- The full-time salary amounts help you decide whether to approve the proposed progression or salary update. You can compare the current full-time salary with grade ladder rates. The full-time salary might correspond to the grade ladder rate for the current step. But, it might be different if the process overrode the salary record. The proposed full-time salary is the grade ladder rate for the proposed step, before getting prorated for FTE value.
- The salary amounts are the amounts stored in the salary record. The current salary is the actual stored amount. The proposed salary becomes the stored amount. The proposed salary includes proration by FTE and rounding, if applicable.

## FTE Proration and Salary Adjustment Type

The grade step progression processes prorate salary amounts by FTE according to the Salary Adjustment Type setting of the progression grade ladder.

- Here's how the processes adjust the salary when the salary amount is determined by users:
  - If you leave Salary Adjustment Type blank, the processes don't adjust the proposed salary amounts for FTE.
  - If you set Salary Adjustment Type to FTE less than 1 only, the processes adjust the salary if the FTE is less than 1. They don't adjust salaries where the FTE is greater than 1.
  - If you set Salary Adjustment Type to FTE not equal to 1, the processes adjust the salary if the FTE isn't equal to 1. For example, if the FTE is .75 or 1.25, the processes adjust the salary.
  - If FTE is 1, the processes ignore the Salary Adjustment Type setting and don't adjust salaries.
- When the salary amount is determined by simple components, the processes always adjust the salary amount by the FTE, even you leave the field blank.

### *Related Topics*

- [Overview of Grade Step Progression Processing](#)
- [Overview of Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates](#)

# 26 Individual Compensation Plans Overview

## Overview of Individual Compensation

You can let managers and specialists award compensation outside of the regular compensation cycle. For example, a line manager can give someone a spot bonus or grant stock shares. And a compensation manager can give people education reimbursements.

You can also let people make and change their own contributions to charitable or savings plans. These off-cycle allocations and contributions require appropriate payroll elements and individual compensation plans.

- The payroll element communicates the payment or distribution details to payroll for processing. For example, a company car plan has options with different compensation amounts for various mileage ranges. A spots bonus plan has options with different fixed monetary amounts.
- The plan includes at least one option that links the payroll element to the plan. It also decides when payments start and end, the people eligible for the plan, and when people can access the plan. For example, a car allowance plan has multiple options for monthly payments starting January 1 and ending December 31 according to mileage ranges. People in field sales and service jobs are eligible for the plan, and managers can award compensation when they hire, transfer, and promote people.

You can also let people view nonmonetary awards by adding the relevant plans to compensation history. To let them view their payment and contribution history, add the payroll elements linked to the plans that have recurring payments or contributions.

## Options in an Individual Compensation Plan Configuration

Each individual compensation plan needs at least one option. You can set up a nonmonetary option, such as grant stock shares, or a monetary option. Link a payroll element, and optionally select a budget pool and request or require attachments.

When you create the option, you need to select the appropriate payroll element. You can select one element per legislative data group. So you can link an option to multiple elements only when the element legislative data groups are different. Proposers see the input values configured for the element when they select the option while allocating compensation or contribution. The monetary amounts that they propose are in the currency of the element. On pages that include the currency switcher, people viewing the proposed amounts can see them in their preferred currency.

**CAUTION:** Make sure that salary bases don't use the element selected for the option. Using the same element across compensation objects can lead to payroll conflicts. It can also lead to unexpected deletions of salary or individual compensation.

You can optionally select a budget pool to let managers track off-cycle and on-cycle awards.

You can also request or require that proposers attach a specific document type to help approvers decide whether to approve or reject proposed plan allocations. For example, set up a vehicle allowance option to require a vehicle details document. The documents get retained in people's document records for future reference.

The document settings affect all flows except Offer flows. Currently people can't add attachments in the Offer flows, so the flows ignore any option document settings configured for the individual compensation plan.

#### *Related Topics*

- [How You Let Managers Track Off-Cycle and On-Cycle Compensation Against a Budget](#)
- [Document Type Settings for Individual Compensation](#)
- [Create a Payroll Element to Use with Individual Compensation Plans](#)

## Document Type Settings for Individual Compensation

Make sure that document types you use with compensation objects, such as options for individual compensation plans, have these configurations. Manage document type configurations using the Document Type task.

Field	Value
Document Type Level	Assignment
Category	Compensation
Minimum Attachments	0
Document Name Applicable	Relevant and Required
All other attributes	Not required
Allow Occurrences	Yes

## Payment Dates in an Individual Compensation Plan Configuration

You specify when plan payments start and end using standard date rules. For example, the person proposing the award can set the payment date. You only need to set end dates for recurring payments, such as car allowances.

If you select the **Start or submission date** option, the award or contribution uses the start date when people can set it during actions. Otherwise, the award or contribution uses the date when they submit the action.



#### *Related Topics*

- [Sync Individual Compensation Plan Dates with the Start Date in a Pending Worker Action](#)
- [Sync Individual Compensation Plan Dates with the Projected Hire Date in an Offer](#)
- [Payment End Date Considerations for Individual Compensation Plans](#)
- [How the Projected Hire, Start, or Submission Date Works in HR Actions](#)

## Eligibility in an Individual Compensation Plan Configuration

You decide who can participate in the compensation plans or options with eligibility profiles. You can attach eligibility profiles to the plan, an option, or both.

For example, to the company car plan, you attach an eligibility profile that includes only the Sales and Field Service departments. To the options, you attach other profiles that restrict payment amounts by mileage ranges.

Compensation eligibility evaluations also use criteria defined at the element eligibility level to decide if someone is eligible for a compensation plan. The best practice for controlling eligibility is to either use eligibility profiles or element eligibility, but not both.

If you add multiple profiles, you need to mark at least one profile as required.

#### *Related Topics*

- [Eligibility Profiles](#)

## How Individual Compensation Plan Eligibility Works with Assignment Creation Flows

Payroll element eligibility and plan-level or option-level eligibility profiles don't apply because the assignment information hasn't been submitted yet.

## How Individual Compensation Plan Eligibility Works with Assignment Correction and Update Flows

Payroll element eligibility and plan-level or option-level eligibility profiles apply to the existing assignment information. But they don't apply to the corrected or updated information because it hasn't been submitted yet.

## Plan Access Restrictions in an Individual Compensation Plan Configuration

Control who can start, update, or stop individual compensation allocations, and for what circumstances by restricting plan access. For example, set up a plan so that only people using the Manager Personal Contributions action can start, update, or stop contributions.

### *Related Topics*

- [Plan Access Restrictions](#)
- [The Difference Between Plan Access Restriction and Access Security](#)
- [Copy Individual Compensation Allocations During Local and Global Transfer](#)
- [Individual Compensation Plan and Option Visibility](#)

## Plan Info in an Individual Compensation Plan Configuration

To help managers awarding the plan or individuals contributing to the plan, you can optionally provide background information or instructions. Also include links to relevant documents and websites.

You can also specify whether people viewing the plan see this information when they select the plan, or after they click **Show plan info**.

## Validate Individual Compensation Plans

You can validate the integrity of the individual compensation plan that you're editing. Or you can validate all of the plans on the Individual Compensation Plans page.

You can detect and report on references to all deleted payroll elements still retained in the configured individual compensation plan options. When someone deletes a payroll element before removing it from the plan option, it creates orphan data in the individual compensation plan setup table. The orphan data can cause issues in allocations. To prevent these issues, you can run the Purge Orphaned Payroll Element Setup Data from Individual Compensation Plans process.

Before purging the orphaned payroll element data, you can run the process in Preview mode and generate a log with the data the process will likely purge. When you run the process to purge the orphan rows, it cleans up the individual compensation setup tables.

# Journey Checklist Tasks and Individual Compensation Plan Allocations

You can send people checklist tasks as part of their journeys when they get new individual compensation allocations. For example, an individual subscribes to a voluntary deduction.

The corresponding journey includes checklist tasks that require an HR specialist to manually generate a membership ID, enable portal access, and issue a welcome kit.

## Assign Checklists

You can assign checklist tasks only when people add new individual compensation allocations using actions, such as these:

- Individual Compensation
- Manage Personal Contribution
- Administer Individual Compensation

You can also assign tasks with Recruiting and Global Human Resource actions that add individual compensation allocations. The checklist assigns the tasks after the new individual compensation allocation passes final approval and the element entries get created. The checklist listens to the new element entries for the individual compensation allocation using events. For the events to work, make sure that the profile option `HRC_DISABLE_HCM_EVENTS_PROCESSING` is **N**.

## Create the Checklist Template

You create a checklist template following the standard procedure and using these individual compensation settings:

- On the General tab, select a category.
- On the Tasks tab, configure the tasks.
- On the Actions and Events tab, configure the event that causes the journey to assign the checklist. For new individual compensation allocations, the creation of the entry for the specified element causes the checklist to assign the task.
  - a. Add an event. Then in the Name field, select **Individual Compensation**.
  - b. Edit the condition and create a group. The attribute defaults to Element Type and the condition defaults to the Equals operator and Constant operand type.
  - c. In the Operand Value field, click **search**. Use the Search and Select dialog box to select the appropriate payroll element for the individual compensation option.

You can use only the OR group connector when you define group conditions for individual compensation. The conditions don't support the AND connector.

## Control When the Checklist Triggers

To control when the checklist triggers, you use the allocation criteria.

- The default Checklist manually allocated or record created or approved option triggers when the individual compensation allocation gets approved and element entries get created. The trigger ignores the payment start date.
- The When the action record becomes effective option triggers the checklist on the payment start date.

### *Related Topics*

- [Predefined Journey Templates](#)
- [Journey Template Definition](#)
- [Considerations for Configuring Actions in Journeys](#)
- [How You Configure Events in Journeys](#)
- [Journey Display Properties](#)
- [Deep Links in Journeys](#)

## How You Let People Submit Personal Contributions When Earlier Contributions Are Pending Approval

To let people submit personal contributions when earlier contributions are pending approval, you need to enable the CMP\_DISABLE\_PENDING\_APPROVALS\_CHECK\_IN\_MANAGE\_CONTRIBUTION profile option at the Site level.

You also need to configure the access details of the relevant individual compensation plans. For the Manage Personal Contribution task, never allow update allocations and never allow the discontinuation of allocations. This access detail configuration ensures that individuals can't change or delete existing contributions, preventing conflicts for contributions that are pending approval.

With this option enabled, approvers can't edit submitted contributions as part of their approval. Also, they can't see the submitted values if they edit the submitted contribution. Line managers, compensation managers and administrators, and HR specialists can still make updates or deletions using the Manage Individual Compensation or Administer Individual Compensation tasks. This visibility assumes you configured the plan access to include the corresponding actions for these tasks.

### *Related Topics*

- [Plan Access Restrictions](#)

# 27 Payment Dates in Individual Compensation Plans

## Sync Individual Compensation Plan Dates with the Projected Hire Date in an Offer

You can sync the payment start and end dates of individual compensation plans included in an offer, with the projected hire date.

Do this by setting the payment start and end dates of the individual compensation plans to Projected Hire, Start, or Submission Date. Then whenever you change the projected hire date in an offer and go to the individual compensation section, the plan payment dates adjust automatically.

For example, you've an offer with a projected hire date of January 1, 2022. The offer includes an individual compensation plan with payments that start the same day. Later you revise the projected hire date to February 1, 2022. When you get to the individual compensation section, the existing payment start date automatically adjusts to February 1, 2022, to align with the new projected hire date.

### Delay Payment

You can optionally delay the payment date by a specific number of days, months, years, or combination. The offer calculates the payment start and end dates using the projected hire date and the specified delay. For example, your offer includes paying a signon bonus 1 month after the projected hire date. Since your current projected hire date is February 1, 2022, the payment start date of the bonus allocation is March 1, 2022.

### Override the Payment Date

You can let recruiters override the calculated payment start date, end date, or both when they include the plan in their offers. When they do override the payment dates, the projected hire date and the payment dates can't automatically sync anymore. The recruiters need to delete the individual compensation plan and add it again every time they change the projected hire date. They can't correct the existing payment dates.

Offer flows indicated overridden plan dates with (Set manually).

## Examples of How Payment Start Dates in an Offer Sync with the Projected Hire Date

You have an offer with three individual compensation plans that have slightly different configurations for the payment start date of Projected Hire, Start, or Submission Date.

Here's how the configurations affect the payment start dates for the three plans when the projected hire date for the offer changes.

Payment Start Date Configuration	Original Projected Hire Date	Original Payment Start Date	Revised Projected Hire Date	Adjusted Payment Start Date
Plan 1, the start date is the projected hire date	Jan 1, 2022	Jan 1, 2022	Mar 1, 2022	Mar 1, 2022
Plan 2, the start date is 1 month after the projected hire date	Jan 1, 2022	Feb 1, 2022	Mar 1, 2022	Apr 1, 2022
Plan 3, the start date is the projected hire date, but recruiters can override the date	Jan 1, 2022	Initially set to Jan 1, 2022  Recruiter overrides to Apr 1, 2022	Mar 1, 2022	Apr 1, 2022  Overridden dates remain unadjusted

The payment start date for Plan 3 doesn't change because the recruiter overrode the original date. The recruiter needs to delete this individual compensation plan and add it again with the revised payment start date.

After the external candidate accepts the offer with the projected hire date of March 1, 2021, the individual compensation plans show up on the pending worker page. The plan payment dates for the pending worker are the same dates shown in the Adjusted Payment Start Date column.

## Sync Individual Compensation Plan Dates with the Start Date in a Pending Worker Action

You can sync the payment start and end dates of individual compensation plans included in a pending worker action, with the start date.

Do this by setting the payment start and end dates of the individual compensation plans to Projected Hire, Start, or Submission Date. The plan payment dates adjust automatically whenever people change the start date in the Edit Pending Worker action and go to the individual compensation section.

For example, you've a pending worker with a start date of January 1, 2022. The details include an individual compensation plan with payments that start the same day. Later you revise the start date to February 1, 2022. When you get to the individual compensation section, the existing payment start date automatically adjusts to February 1, 2022, to align with the new start date.

The plan payment dates won't adjust if people change the start date and don't visit the individual compensation section. They won't automatically adjust in these situations either:

- When people change the start date in other flows, such as Employment details, Change Employment Start Dates, and Change Work Relationship Start Date
- On any other pages where people can change the start date of the pending worker.
- When people use HCM Data Loader or REST services

People need to manually delete and readd the individual compensation plans in all such scenarios.

When someone end dates the individual compensation row in the pending worker flow, the flow carries the end date forward to the conversion stage.

## Delay Payment

You can optionally delay the payment dates by a specific number of days, months, years, or combination. The pending worker flow calculates the payment start and end dates using the start date and the specified delay. For example, your details include paying a signon bonus 1 month after the start date. Since your current start date is February 1, 2022, the payment start date of the bonus allocation is March 1, 2022.

## Override the Payment Date

You can let people override the calculated payment start date, end date, or both when they include the plan in the individual compensation section. When they do override the payment dates, the start date and the payment dates can't automatically sync anymore. They need to delete the individual compensation plan and add it again every time they change the start date. They can't correct the existing payment dates.

Pending worker flows identify overridden plan dates with (Set manually).

## Examples of How Payment Start Dates in a Pending Worker Action Sync with the Start Date

You've a pending worker action with three individual compensation plans that have slightly different configurations for the payment start date of Projected Hire, Start, or Submission Date.

Here's how the configurations affect the payment start dates for the three plans when the start date for the pending worker changes.

Payment Start Date Configuration	Original Projected Hire Date	Original Payment Start Date	Revised Projected Hire Date	Adjusted Payment Start Date
Plan 1, the start date is the pending worker start date	Jan 1, 2022	Jan 1, 2022	Mar 1, 2022	Mar 1, 2022
Plan 2, the start date is 1 month after the pending worker start date	Jan 1, 2022	Feb 1, 2022	Mar 1, 2022	Apr 1, 2022
Plan 3, the start date is the pending worker start date, but people can override the date	Jan 1, 2022	Initially set to Feb 1, 2022 Overridden to Apr 1, 2022	Mar 1, 2022	Apr 1, 2022 Overridden dates remain unadjusted

The payment start date for Plan 3 doesn't change because you overrode the original date. When you need to revise the dates, you need to delete this individual compensation plan and add it again with the revised payment start date.

## Payment End Date Considerations for Individual Compensation Plans

If the individual compensation plan configuration has a nonrecurring payroll element, the payment end date depends on the person's payroll relationship. Here are situations that ignore the payment end date configured for the plan:

- When payroll isn't available in the payroll relationship, the payment end date is the same as the payment start date.
- When payroll is available in the payroll relationship, the payment end date is the period end date for the payroll process.

The Offer and Pending Worker flow end dates carry forward to the next stage when the end date for the plan payment is Projected Hire, Start, or Submission Date.

## How the Projected Hire, Start, or Submission Date Works in HR Actions

Here's how the Projected Hire, Start, or Submission Date payment date works with HR actions started from the Manage Job Offers page or elsewhere.

### Started from Manage Job Offers

You can sync the initial payment start and end dates of individual compensation plans included with the projected hire date of the internal offer. Do this by setting the payment start and end dates of the individual compensation plans to Projected Hire, Start, or Submission Date. When the proposer starts the HR action, the when date defaults to the projected hire date of the offer. If the proposer changes the when date and goes to the individual compensation section, the plan payment dates adjust automatically. If the proposer changes the when date later on, they need to delete and add the individual compensation plans again, with the correct payment dates.

For example, you've an internal candidate offer with the projected hire date of January 1, 2022. You then start processing the global transfer with a when date of January 1, 2022. The transfer includes an individual compensation plan with payments that start the same day. When you get to the individual compensation section, you see that the plan has a payment start date of January 1, 2022. Before you submit the transfer, you revise the when date to February 1, 2022. When you get to the individual compensation section this time, the existing payment start date remains January 1, 2022. You need to delete the plan and add it again with the correct payment dates.

### Started from a Page Other Than Manage Job Offers

The Projected Hire, Start, or Submission Date option works the same as the Start or Submission Date option. When the proposer sets the when date and goes to the individual compensation section, the section sets the payment dates to the when date. After that, if the proposer changes the when date, they need to delete the plan and add it again with the correct payment dates.



# 28 Access and Action Options, and Option Visibility in Individual Compensation Plans

## Plan Access Restrictions

You control the situations when a manager can create, update, or discontinue individual compensation awards using plan restrictions. These same restrictions let you control similar actions for people contributing to savings and donation plans.

You configure these restrictions when you create the individual compensation plan using the Individual Compensation Plans task in the Compensation work area.

### Whether to Restrict Access

The first decision you make on the Plan Access tab is whether to restrict access to the plan.

- If you select **No**, the plan becomes available to everyone on all pages where people hire individuals, or manage individual compensation or personal contributions. It's very rare that you'd select this option. For example, if you don't restrict access to a bonus plan, then people could manage the bonus plan for themselves. That's because the plan would appear in the Manage Personal Contributions action.
- If you select **Yes**, you need to add at least one action where the plan should be available. Make sure that you select all related actions. For example, you set up the plan so that it's visible in the Pending Worker action. You also want to make it visible in the Hire action. Otherwise, when someone converts to an employee, their manager can't see the allocation. And, when the manager submits their changes, the employee's allocation gets removed. You can optionally configure the corresponding access details about when people can start, update, or stop allocations or contributions.

### All Action

The default action All is similar to setting Restrict Plan Access to No, except that you can configure access details. This action opens plan access to all actions available in the list, including the Manage Contributions action. Basically, anyone who meets the eligibility criteria for the plan can see the plan. If you added this action to a bonus plan, for example, anyone eligible for the plan could award themselves a bonus.

To add other access actions, you need to change the All action to something else, such as Hire. Then, the **Add** icon is available and you can add any other access actions that are appropriate for the plan.

### HR Actions

To make the plan available to people as part of an HR action, add one or more HR actions. For example, add the Transfer action to a moving allowance plan to make the plan available when people transfer someone using that action.

To make the plan available to recruiters creating or editing job offers, you need to add the same action that they select in the offer. For example, the recruiter selects the **Add Pending Worker** or **Add Assignment** action while creating the offer. The individual compensation plan access needs to include the same action for the plan to appear in the Other Compensation section of the job offer.

## Manage Individual Compensation Action

To make the plan available to people when they want to award off-cycle compensation to someone, add the Manage Individual Compensation action. You can add only this action or also add HR actions. For example:

- You want managers to use the Bonus plan to reward performance. So, you restrict plan access to the Manage Individual Compensation actions.
- You want managers to use the Bonus plan to award hiring bonuses or to reward performance. So, you restrict plan access to the Hire and Manage Individual Compensation actions.

## Administer Individual Compensation Action

To make the plan available to only HR specialists, compensation specialists, and compensation managers, add the Administer Individual Compensation action. These people can see plans with this plan access action using the Administer Individual Compensation task.

## Manage Contributions Action

To make the plan available for people to contribute to, such as for retirement savings or charities, add the Manage Contributions action. Don't add any other actions for contribution plans.

# The Difference Between Plan Access Restriction and Access Security

Access security identifies which roles grant access to actions, such as Individual Compensation, Manage Personal Contribution, and Administer Individual Compensation.

Plan access restriction identifies which actions, such as Personal Contribution or Individual Compensation, show the plan. It also lets you control if people can add, edit, or delete contributions or allocations.

## Copy Individual Compensation Allocations During Local and Global Transfer

You can ensure that local and global transfers automatically copy individual compensation allocations and personal contributions to the new assignment. Do this when you configure plan access for individual compensation plans.

Either set Restrict Plan Access to No. Or set it to Yes and add the Global Transfer action.

**Tip:** When the plan element uses the Last Standard Process Date or Last Standard Earning Date date, the plan isn't end dated for the source assignment.

## When Allocations and Contributions Aren't Copied

The automatic copy doesn't happen for these situations:

- If the legal employers for the source and destination assignments have different legislative data groups
- If the local and global transfer action doesn't include the Individual Compensation section, or the person proposing the transfer don't visit the section
- If Restrict Plan Access is Yes and the Global Transfer action isn't added

## Individual Compensation Plan and Option Visibility

Your plan configuration decides whether people can see the plan or option when they use the Administer Individual Compensation, Individual Compensation, and Manage Personal Contribution tasks.

The person getting the compensation allocation or making the personal contribution needs to meet these conditions:

- Be eligible for the element you associated with the option.
- Meet the criteria of the eligibility profile you associated with the plan, option, or both.

Also, the plan status needs to be Active and plan access should have the appropriate actions added. For example, to be visible for the Manage Personal Contributions task, plan access needs to have the Manage Contribution action.

### *Related Topics*

- [Plan Access Restrictions](#)



# 29 Example Individual Compensation Plan Configurations

## Spot Bonus and Stock Grant Plan Configuration

Here's how you create a plan to make a onetime spot bonus payment or stock grant. Use the Elements and Individual Compensation Plans tasks on the **My Client Groups > Compensation** page.

1. Create a payroll element that makes a onetime payment. Configure the element to process once per payroll period and let managers enter the payment amount or grant quantity.
2. Create the plan.
  - a. Add an option with the payroll element. For stock grants, be sure to set the nonmonetary units to **Shares** and select the grant type.
  - b. Select a payment or grant start date. If it's present, leave the end date blank to indicate this is a onetime payment.
  - c. Optionally, add an eligibility profile to limit the people that the plan applies to. For example, use derived factors to identify full-time people with a minimum service of 1 year as eligible for the spot bonus. Identify full-time people with a minimum service of 5 years as eligible for the stock grant.
  - d. Restrict access to specific HR actions, such as Hire and Promote. Also add the Manage Individual Compensation action so that managers can award bonuses or grant stock to their people using the Individual Compensation action.

Stock grant records get the stock or trading symbol and grant type from the plan option. They get the grant date and number of shares granted from the element entries.

## Car Allowance Plan Configuration

Here's how you create an ongoing car allowance plan with two payment options. The options vary according to the distance of regional territories from headquarters. Use the Elements and Individual Compensation Plans tasks on the **My Client Groups > Compensation** page.

1. Create two payroll elements to make recurring payments once a month. For territories within a 100-mile radius of headquarters, set the input value default to **300**. For territories beyond a 100-mile radius, set the input value default to **500**.
2. Create the plan.
  - a. Configure an option for each payroll element.
  - b. Let managers enter payment start and end dates according to agreements with their people. For example, a manager starts payment on the first of the month or the first payroll period after a promotion. They end payment after 1 year.
  - c. Attach an eligibility profile that limits plan eligibility to people with the Regional Sales Manager job.
  - d. Restrict access to specific HR actions, such as Hire and Transfer. Also add the Manage Individual Compensation action so that managers can award or update the car allowance for their people using that action.

- e. Optionally, add instructions that tell managers how the payment policy varies according to the distance from headquarters. And, include a link to the policy.

## Charity or Savings Contribution Plan Configuration

Here's how you create a plan that lets people manage their personal contributions. Use the Elements and Individual Compensation Plans tasks on the **My Client Groups > Compensation** page.

1. Create a payroll element to accept recurring contributions per payroll period. Configure the input value to be either a flat amount or percentage.
2. Create the plan.
  - a. Add an option for contributions of either amount or percentage.
  - b. Select a start date, typically January 1 of the next calendar year or after open enrollment.
  - c. Restrict access to the Manage Contributions action to let people manage their instances of the plan. You can define periods when people can enroll for the first time, update existing contributions, or stop contributions. For example, let people always create allocations. Restrict when they can make updates or discontinuations to a specified period, such as an open enrollment period of November 15 through 30.
  - d. Optionally, add instructions that clarify specific plan policies.

# 30 Compensation History

## Compensation History Categories

Compensation history has a summary table with four categories--Salary, Stock, Other Compensation, and Recurring Payments--and links to compensation details. Summary info covers 5 years of history while details cover all years.

### Salary

The Salary category has these three rows of information:

Row	Comments
Overall Salary	For the current year, it's the most recent pay rate. The rate appears in the frequency of the person's salary basis, such as hourly, monthly, or annually.  For previous years, it's the pay rate on 31 December of that year.
Annualized rate	Calculated using the person's overall salary and the annualization factor of the salary basis frequency as of 31 December of that year.
Percentage change	The difference in the person's overall salary from the previous year, if history exists.

In the summary table, click the base pay link 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 shows 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 more information, such as grant date, vested shares, and the estimated value of unvested shares.

### Other Compensation

The Other Compensation category shows 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.

You can see elements information with only input values that are numbers, integers, and money because history was designed for monetary and quantity compensation. For example, you can see salary, bonus, and allowance amounts and quantities of vested, unvested, exercised, and unexercised stock shares. Also, the overall view shows various totals, which history can't calculate for nonmonetary and nonnumeric values.

## 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.

### *Related Topics*

- [How You Set Up the Other Compensation and Recurring Payments Summary Data for Compensation History](#)

## How You Set Up the Other Compensation and Recurring Payments Summary Data for Compensation History

You set up the summary table data that shows in the Other Compensation and Recurring Payments compensation history categories. Use the Compensation History task on the **My Client Groups > Compensation** page.

The Other Compensation category groups one-time payments, such as bonuses. The Recurring Payments category groups nonbase pay distributions, such as allowances or tuition reimbursements. To include compensation in these history categories, on the Compensation History page, select the appropriate payroll elements and corresponding input values. The payroll element definition automatically supplies the remaining data and identifies the history category based on the recurrence of the payroll element.

Compensation history automatically gets the applicable Salary and Stock summary data, you don't need to do any setup.

### *Related Topics*

- [Compensation History Categories](#)



# 31 Stock Grants

## 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](#)

## FAQ

### 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.

# 32 External Data

## External Compensation Data

You can add compensation-related information from third-party and legacy applications, such as pension, annuity, royalty, and assignment segments. You can include this external data as default values in worksheet columns for workforce compensation plans.

You can also include it as compensation items in total compensation statements.

### Person by Person or Many People at a Time

You can manually enter data for one person at a time using the **External Data** task in the Compensation work area. On the same page, you can use the **Prepare Import Spreadsheet** button to import external data for many people at a time.

### Data to Add

Here's the data you add, regardless of method:

- Record type
- Start Date
- End Date
- Sequence Number
- Currency
- Columns, such as **Column 01** and **Column 02**

To avoid difficulties when adding other data in the future, be sure to provide all relevant data, such as end date, sequence, and currency. For example, if your external data includes amounts, you might need the currency to ensure calculations handle the amounts correctly.

### Person-Level Data to Assignment-Level Data

You can add external data at the person or assignment level. Adding it at the assignment level lets you use assignment-level security. You can update personal-level external data to assignment-level using the **Update Assignments** process. The process updates the data to the primary assignment as of the start date for the external data record.

#### *Related Topics*

- [Record Type Lookups for External Compensation Data](#)
- [Import External Compensation Data in the Integrated Workbook](#)

## Record Type Lookups for External Compensation Data

When you import data from third-party or legacy applications, you need to select the record type. The record types in the choice list come from the `CMP_EXTERNAL_DATA_RECORD_TYPE` lookup type.

You can change delivered values, such as data from a third-party supplier application, at any time. And you can add new values. For example, you add a lookup code to identify data from the third-party partner that manages your pension, annuity, royalty, or 401k.

Use the **Lookups** task in the Compensation work area.

### *Related Topics*

- [Overview of 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.

## Upload External Data

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 immediately download 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*

- [Record Type Lookups for External Compensation Data](#)
- [Set Up Desktop Integration for Excel](#)
- [Guidelines for Using Desktop Integrated Excel Workbooks](#)
- [Troubleshoot Desktop Integration for Excel](#)

## 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.

## Delete External Data in Compensation

On the External Data page, Actions menu select either **Purge Entire Table** or **Delete Records Matching Criteria**.

Or you can use the HCM Data Loader (HDL) to delete selected rows (My Client Groups, Data Exchange).

# 33 Workforce Compensation Overview, Lookups, and Security

## Overview of Workforce Compensation

Let managers and specialists allocate compensation, such as merit increases or stock grants, to groups of people on a focal, anniversary, or periodic basis. This includes letting them promote people and rate performances while allocating compensation, as well as communicating compensation changes.

Also set up managers so they can automatically calculate and allocate compensation using models and analyze proposed changes to ensure outcomes like these:

- Equity among peer groups and by manager
- Alignment with the market and with organizational compensation strategies for performance

You do all of this when you set up your workforce compensation plans. The setup involves configuring the foundation, budgets, worksheets, models, and reports aspects of each plan. Managers and specialists use the worksheets to propose compensation, performance ratings, and promotions. They also use them to approve proposed changes and communicate the changes. You can also optionally extend certain lookups that people in various job roles use in the workforce compensation cycle. And you can use a fast formula to retrieve data or run calculations on data.

## Deep Links in Workforce Compensation

You can let people access workforce compensation from external sites or include workforce compensation in a journey checklist. To use deep links in compensation, go to Navigator > Tools > Deep Links > search for workforce compensation.

The deep link takes people to the workforce compensation landing page. People still need to navigate to the desired plan. This prevents people from accessing plans where plan cycles are closed or are outside of the plan cycle dates.

### *Related Topics*

- [Deep Links](#)
- [Deep Links in Journeys](#)

## 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. The CMP\_BUDGET\_AUDIT\_REASONSlookup type already has the following reasons set up.

The **CMP\_BUDGET\_AUDIT\_REASONS** lookup type already has the following reasons set up. You can't change or delete them, but you can add reasons that support your adjustment policies. The codes that start with CMP appear in audit history.

- 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

You configure lookups in the Compensation work area using the **Lookups** task.

#### *Related Topics*

- [Overview of Lookups](#)

## Nonmonetary Unit of Measure Lookups

You use nonmonetary units of measure throughout workforce compensation, for example, to set up a compensation worksheet for stock grants. The **CMP\_NONMONETARY\_UOM** lookup type already has these units of measure set up, which you can change and add to, to support your compensation policies.

- Days
- Hours
- Items
- Shares
- Units

You configure lookups in the Compensation work area using the **Lookups** task.

#### *Related Topics*

- [Overview of Lookups](#)

## User-Defined Column Lookups

To let managers select from relevant choice lists on task worksheets, you can enable a column and configure the associated user-defined lookup type.



For example, you create a user-defined column called **Up For Promotion**. Then you configure the related user-defined lookup type with these meanings: **Yes** and **No**. Managers can use the user-defined column to indicate if people are up for promotion.

These are the bundled user-defined column lookup types.

- 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

While the bundled lookup code **Meaning** is **DEFAULT**, any lookup codes you add need to be only numeric. The meanings can be characters, numbers, or a combination of both. You configure lookups in the Compensation work area using the **Lookups** task.

#### *Related Topics*

- [Overview of Lookups](#)

## Workforce Compensation Security

The workforce compensation tasks, plans, and task worksheets that people can use and access depend on plans, user roles, and security profiles setup.

### Person Security Profile

To determine the managers a higher-level manager or specialist can switch to on the Workforce Compensation page, you set up security profiles. The profiles also determine individuals that people can handle changes for on the Administer Workers page in the Compensation work area. And, the profiles determine the people included in the full administration download. The profiles don't affect the people managers see in the task worksheets of a workforce compensation plan.

### User Roles

Bundled job roles and duty roles determine the people who can use workforce compensation tasks and work with workforce compensation plans. You can also create your own roles to grant or remove access to specific compensation tasks.

### Plan Configuration

At a more granular level than the profiles and roles, you can specify the managers who can access the plan tasks. You can also specify the people they can see on each task worksheet using the plan hierarchy. To further limit plan access, you can use plan access overrides and plan status controls. For example, you can make plans available to only compensation administrators using the plan status controls.

## Reference

For more information about workforce compensation security, see Security and Workforce Compensation (document ID 1556468.1) on My Oracle Support at <https://support.oracle.com>.

# Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets

Do you want to secure access to your workforce compensation plans and if so, how? Keep these key considerations in mind when setting up various configurations:

- Do you want to let managers and HR specialists only view plans and let only compensation administrators make changes? You can do this when you configure plan access as part of the foundation plan setup.
- Do you want to let managers change plan access for their subordinate managers? You can do this when you configure approvals and notifications as part of the worksheets plan setup.
- Do you want to let managers change worksheet access for their subordinate managers? You can do this when you configure actions as part of the worksheets display plan setup.

Here are some scenarios and example access configurations.

Scenario	Example Configuration	Workforce Compensation Plan Task
Limit compensation manager access using the <b>Act as Proxy</b> task according to roles.	When you configure plan access, add roles in the Roles with the Plan Access from the Compensation Work Area section.	Configure Plan Access
Limit when managers access their plan worksheets.	<p>To start, when you configure plan hierarchies, set a default access level to determine who has immediate access, such as compensation administrators. Or you can use a fast formula.</p> <p>During the workforce compensation cycle, when managers can access their plan worksheets, compensation administrators can change manager access using the plan approvals task. Or plan administrators can change the worksheet display configuration to enable the approvals task to let managers change the access of their subordinate managers.</p>	Configure Plan Hierarchies

### Related Topics

- [Workforce Compensation Plan Hierarchies](#)
- [Workforce Compensation Plan Access](#)

# 34 Workforce Compensation Plans Overview

## Overview of Workforce Compensation Plan Configuration

People 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 you can determine the specific tasks and information that a plan provides to administrators, managers, and specialists. The setup page displays pertinent plan details and existing budget, component, and worksheet configurations.

To set up a plan, use the **Workforce Compensation Plans** task in the **My Client Groups > Compensation** work area to configure these aspects:

- **Configure Foundation:** Set up details, such as the employment records the **Start Workforce Compensation Cycle** process evaluates for the plan. Also specify if the plan is active or inactive, configure eligibility, and identify cycle dates that determine plan access and eligibility. Set hierarchies that determine whether people have primary responsibility for the plan, can provide suggestions, or can only review the plan. And enable currency switching and configure currency properties, set up plan access, and configure a feedback survey and plan information.
- **Configure Budgets:** Specify how to distribute budgets, set up budget groups, and identify storage methods for budget pools. Also track on-cycle and off-cycle compensation against the budget.
- **Configure Worksheets:** Determine which worksheets to include in a plan as well as display properties, dynamic calculations, alerts, and assignment segments. Managers and specialists use these worksheets to propose compensation, performance ratings, and promotions. They also use them to approve proposed changes and communicate the changes.
- **Configure Models and Reports:** Let managers and specialists build compensation models that help them align their budgets and compensation allocations with organizational pay practices and guidelines. Let them automatically allocate modeled amounts according to each person's country, job, grade, and quartile. And create Oracle Transactional Business Intelligence reports to give managers and specialists relevant contextual information so that they can make informed compensation changes. Also configure plan filters and analytics.

## Performance Considerations for Workforce Compensation Plans



You need to consider how responsive workforce compensation plans are when determining how many plans to create. Plans can include a few or many simple dynamic calculations and few or many complex calculations. The more dynamic calculations and the more complex the calculations, the slower the plans respond when people change different values.

To optimize plan performance, you want to create plans tailored to specific audiences. For example, compensation administrators want to optimize compensation budgets and allocations across their client groups. They typically

need more information to test different allocation scenarios beyond what the modeling functionality can handle. Line managers though want the absolute minimum information that they need to make appropriate allocations across their teams. And they want any contextual or background information about their people in reports or a detailed worksheet that they can look at separately, as needed.

You create separate plans for each audience. The plans for compensation administrators include the dynamic calculations and fast formulas that can slow plan performance. The plans for line managers include cross-references to key calculations in the administrator plans, so the managers can see critical calculation results. And manager plans can include fewer dynamic calculations with simpler conditions, as appropriate. Or you might let managers use models to explore allocation scenarios instead of configuring dynamic calculations for their plans.

To further optimize plan performance, you want to validate each plan. Validation lets you check that the evaluation order for dynamic columns is correct and generates the results expected by the plan audience. It also helps you determine the optimal number of dynamic calculations and alerts to include so the plan responds as each audience considers acceptable.

#### *Related Topics*

- [Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets](#)

# 35 Foundation: Plan Details in Workforce Compensation

## Employment Records to Use in the Compensation Cycle

You can specify the employment records used by the Start Workforce Compensation Cycle and Refresh Workforce Compensation Data processes when you configure plan details.

### Primary Assignments

The processes include people and set their eligibility status according to only their primary assignments. Anyone who has multiple assignments and a plan that uses a manager hierarchy appears only on their primary assignment manager's worksheet.

### All Assignments

The processes include people and set their eligibility status according to all of their assignments. Anyone who has multiple assignments might appear on their manager's worksheet more than once. And they might have different eligibility statuses. For example, they might have an **Eligible** status according to the primary assignment and an **Ineligible** status according to another assignment. If the manager for each assignment is different, the individual might appear on worksheets for multiple managers.

### Employment Terms

The processes include people and set their eligibility status according to the employment terms of legal employers using the three-tier employment model. If the plan uses a manager hierarchy, people appear on the primary assignment manager's worksheet.

The processes exclude people whose legal employers have employment terms that use the two-tier employment model.

### Any Assignment or Employment Term with a Salary

The processes include people and set their eligibility status for all of their assignments and employment terms that have a linked salary record. If the plan uses a manager hierarchy, people appear on the primary assignment manager's worksheet. Anyone who has multiple assignments with a salary record might appear on their manager's worksheet more than once. They could have a different base salary for each assignment. And they might have different eligibility statuses. For example, they might have an **Eligible** status according to the primary assignment and an **Ineligible** status according to another assignment. If the manager for each assignment is different, the individual might appear on worksheets for multiple managers, with different salaries for each.

The processes exclude people whose assignments and employment terms don't have a linked salary record.

## Active and Inactive Workforce Compensation Plans

When you configure plan details, you need to specify whether the plan status is Active or Inactive.

Compensation cycles include active plans. At any time during specified cycle dates, line managers can access their active plans using the **Workforce Compensation** task for their team. Even after approved changes transfer to HR, compensation managers can view plans using the Compensation task for their client groups.

Subsequent workforce compensation processes exclude inactive plans. Line and compensation managers can't view or update the plans. Typically, you use this status to create and test plans, or for obsolete plans. You can purge only inactive cycles.

Compensation administrators can change the status back to **Active** at any time.

## Actions and Reasons in Workforce Compensation

To provide context, all salary and assignment changes include an action and optional action reason. You need to select the action when you configure plan details. The bundled action that you can set in plan details is Allocate Workforce Compensation.

If the plan includes different task worksheets for different allocation types, such as merit increases, bonuses, and stock shares, you don't select an action reason. If the plan focuses on a single action, you can select the appropriate action reason. For example, you create a plan where managers change compensation according to performance evaluations, so you select the **Performance** action reason.

The action and reason are stored with all salary and assignment changes that transfer to HR after the compensation cycle is complete. Changes from the performance evaluation plan would show in people's salary history as **Allocate Workforce Compensation** and **Performance**.

Here's a comprehensive list of the bundled compensation action reasons.

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

You can extend the available actions and action reasons using the Configure Actions and Action Reasons quick actions under **My Client Groups > Workforce Structures**.

*Related Topics*

- [Reason Lookups](#)
- [Action Framework](#)





# 36 Foundation: Plan Eligibility and Cycles in Workforce Compensation

## Workforce Compensation Plan Eligibility

You determine the people who are eligible and ineligible for allocations from workforce compensation plans with eligibility profiles. Here are examples of available criteria:

- Personal, such as gender and home location
- Employment, such as assignment status, hourly or salaried, grade, job, and performance rating
- Derived factors, such as age, length of service, or a combination of both
- Other, such as formula and user-defined criteria
- Labor relations, such as bargaining unit, union, and collective agreement

Add the relevant profiles when you configure plan eligibility. You can also create additional profiles to add, as needed.

**Tip:** Make sure that on your eligibility profiles, you set **Assignment to Use** to **Specific assignment**.

The profile configuration determines what it means to meet criteria. The **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes set the status of people who meet inclusion criteria to **Eligible**. The processes set the status of people who don't meet inclusion criteria, or who do meet exclusion criteria, to **Ineligible**. For managers determined ineligible with subordinates determined eligible, the processes set the manager eligibility status to **Limited**.

### Related Topics

- [How Plan Access, Eligibility, and Default Access Level for Plan Hierarchies Work Together](#)
- [How Eligibility Works With Other Objects](#)
- [Eligibility Profiles](#)

## How Required and Optional Profiles Determine Compensation Eligibility

If you add only one eligibility profile, people have to meet the profile criteria before the processes can set their eligibility statuses. This requirement is true, even if you don't select Required. Here's what the processes require when you add multiple eligibility profiles:

- If all profiles are optional, people have to meet the criteria of at least one profile before the processes can set their eligibility statuses.
- If all profiles are required, people have to meet the criteria of all profiles before the processes can set their eligibility statuses.

- If some profiles are required, people have to meet the criteria of all required profiles and at least one optional profile. Then the processes can set their eligibility statuses.

Related Topics

- [How Eligibility Works With Other Objects](#)
- [Eligibility Profiles](#)

## Option to Track People Ineligible for a Workforce Compensation Plan

You can track ineligible people when you configure plan eligibility. The Start Workforce Compensation Cycle and Refresh Workforce Compensation Data processes include these people on the plan worksheets.

These people also appear on the Compensation work area, Administer Workers page. Each person has an eligibility status of **Ineligible** and none of their fields are editable. Because these people are visible, plan managers and administrators can change statuses to **Eligible**, as they deem appropriate. The approving manager reviews the status and proposed compensation changes when determining whether to approve or reject the submitted plan.

**Tip:** You can include ineligible people on worksheets and let managers hide them when they want by enabling the Hide Ineligible Workers action for plan worksheets.

When you don't track ineligible people, administrators must manually process the people to include them in the plan.

Related Topics

- [Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)

## How the Options to Track and Hide Ineligible People Affect Plan Worksheets

You determine which people the Start Workforce Compensation Cycle and Refresh Workforce Compensation Data processes include on the plan worksheets.

Track Ineligible Workers	Hide Ineligible Workers	Worksheet Effects of Start Process	Worksheet Effects of Refresh Process
Selected	Selected	Doesn't add newly evaluated people it found ineligible to the worksheet.	People found ineligible midcycle drop off the worksheet.
Selected	Cleared	Adds newly evaluated people it found ineligible to the worksheet.	People found ineligible midcycle remain on the worksheet. This includes people whose

Track Ineligible Workers	Hide Ineligible Workers	Worksheet Effects of Start Process	Worksheet Effects of Refresh Process
			termination date is between the cycle evaluation start date and the HR data extraction date.
Cleared	Selected	Doesn't add newly evaluated people it found ineligible to the worksheet.	People found ineligible midcycle drop off the worksheet.
Cleared	Cleared	Doesn't add newly evaluated people it found ineligible to the worksheet.	People found ineligible midcycle remain on the worksheet. This includes people who meet the eligibility criteria and whose termination date is between the cycle evaluation start date and the HR data extraction date.

## Eligibility Profile Testing for a Workforce Compensation Plan

You can test the eligibility profiles you add when configuring plan eligibility. The test lets you select a cycle, a sample person, and an active assignment for your test.

Data security applies, so the person and assignment you can see for the cycle depend on your privileges. If profile criteria includes fast formula, you can see if it worked correctly by reviewing the formula logs. Data security applies, so the person and assignment you can see for the cycle depend on your privileges.

## Workforce Compensation Plan Cycle Dates

You determine various aspects of workforce compensation cycles, such as plan access and eligibility, when you configure plan cycle dates. You can reuse workforce compensation plans across multiple cycles, with a unique set of dates for each cycle.

Here's a comprehensive list of the dates you can set.

Date	Description
Evaluation Period Start and End Dates	Period in which, such as a calendar or fiscal year, a quarter, or a month, when you can evaluate groups of people for compensation allocations. Typically, fast formulas use these evaluation periods. Informational only.
Plan Access Start and End Dates	Read-only period when managers can see their active plans. For example, they can review their people and contextual information to prepare for upcoming allocations.
Worksheet Update Period Start and End Dates	Active period when managers and administrators can make changes to their active plans.

Date	Description
HR Data Extraction Date	When the <b>Start Workforce Compensation Cycle</b> process initially extracts person and assignment data from HR employment records, and places it in the compensation tables. Also the date that the <b>Refresh Workforce Compensation Data</b> process uses to update the data already in the compensation tables.
Eligibility Determination Date	When the <b>Start Workforce Compensation Cycle</b> and <b>Refresh Workforce Compensation Data</b> processes evaluate the specified employment records to determine people's eligibility status.
Currency Conversion Date	When the <b>Start Workforce Compensation Cycle</b> and <b>Refresh Workforce Compensation Data</b> processes obtain conversion rates from the general ledger daily rates table. Plans use the rates to convert monetary amounts for different currencies.
Performance Rating Date	<p>Date that identifies which workforce compensation plans share changes to compensation performance rating. Plans with the same date share any rating changes.</p> <p>To include performance rating information in compensation change statements, you need to select a date. But, the date doesn't affect the sharing of development and performance ratings between Oracle Fusion Performance Management Cloud Service and the workforce compensation plan.</p>
Default Promotion Effective Date	<p>When the <b>Transfer Workforce Compensation Data to HR</b> process sets everyone's job, grade, and position changes to take effect. Date the <b>Start Workforce Compensation Cycle</b> and <b>Refresh Workforce Compensation Data</b> processes use to get the new salary range, compa-ratio, and salary metrics for people whose grade changed.</p> <p>To make proposed promotions available in multiple plans when managers promote people, use the same date across the plans. Also, you can let managers override this date when you configure worksheet column properties. Or you can set an override date when you run the <b>Transfer Workforce Compensation Data to HR</b> process.</p>
Default Due Date	<p>When managers need to submit their plan changes.</p> <p>You can configure different due dates by hierarchy level. Optionally, you can notify managers when a date changes.</p>
Market Composites Effective Date	When the <b>Start Workforce Compensation Cycle</b> process extracts market composite information. It places the information in the compensation tables according to job or position, and location or segment.

# 37 Foundation: Hierarchies in Workforce Compensation Plans

## Workforce Compensation Plan Hierarchies

You can give multiple managers different levels of access to people's allocation during a compensation cycle when you configure hierarchies for workforce compensation plans.

These hierarchies determine the primary and secondary plan managers and the people they see in their worksheets. It also determines the plan reviewers and the people they see. The primary hierarchy also determines how budgets roll down to subordinate managers and approvals route to higher-level managers.

### Examples

Here are some scenarios and examples of how you can configure hierarchies.

Scenario	Example Hierarchies
Country leaders need to manage the budget and line managers need to allocate compensation for their organization.	Set the source of the primary hierarchy to <b>Other Manager Hierarchy</b> and then select the appropriate manager type for the country leader.  Set the source of the secondary hierarchy to <b>Primary Manager Hierarchy</b> .
Dotted-line managers need access to people's compensation, for example, if they completed projects for these managers during the compensation cycle.	Set the source of the primary hierarchy to <b>Primary Manager Hierarchy</b> .  Set the source of the secondary hierarchy to <b>Other Manager Hierarchy</b> and select the appropriate manager type for the dotted-line managers, such as <b>Project Manager</b> . Or you can use a fast formula to determine the dotted-line relationship.
Country-specific HR specialists need access to everyone in their country, regardless of who people's primary plan managers are.	Set the source of the primary hierarchy to <b>Primary Manager Hierarchy</b> .  Set the source of the reviewers hierarchy to a fast formula that determines the country-specific HR specialist.

#### Related Topics

- [How Plan Access, Eligibility, and Default Access Level for Plan Hierarchies Work Together](#)
- [Configure Approvals for Workforce Compensation Plan Worksheets](#)
- [Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets](#)
- [Primary, Secondary, and Other Workforce Compensation Plans](#)

# Options to Configure Workforce Compensation Plan Hierarchies

To give multiple managers different levels of access to the same people, you can configure up to three hierarchies for a single workforce compensation plan.

## Source

To build the management and optional reviewers hierarchies for each plan worksheet, you select a source. You need to select a source for the primary hierarchy, even if you don't configure secondary or reviewers hierarchies.

Source Option	How It Determines the Management Hierarchy
<b>Primary Manager Hierarchy</b>	Uses the primary manager associated with each person's assignment  To use the new HCM position management structure instead of primary managers, sync the position managers with people's assignments. Then select this source. As position managers change, you need to sync the managers and assignments again. Then run the <b>Refresh Workforce Compensation Data</b> process.
<b>Other Manager Hierarchy</b>	Uses the specified manager type associated with each person's assignment, such as project, resource, or regional manager  To use this hierarchy instead of primary managers, make sure that the manager type you select is on people's assignments. If the managers with that manager type change during an open cycle, you need to update the assignments. Then run the <b>Refresh Workforce Compensation Data</b> process.
<b>Formula</b>	Uses the specified hierarchy determination fast formula
<b>Position Tree</b>	Uses the structure of the specified position tree  For this source to determine the correct hierarchy, you need to sync position managers to people's assignments. Then use the primary line manager hierarchy.
<b>Department Tree</b>	Uses the manager defined for the specified department tree

## Missing Managers

You can specify how to handle people who don't have a manager. The available options vary depending on the selected source.

## Missing Relationships

You can record missing relationships in the log files for the **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes. When you select this option, the processes include hierarchy breaks in the log files, for example, when a plan manager doesn't have a manager. Or when an individual doesn't have a primary manager on their assignment. You want to correct hierarchy breaks so workforce compensation plans roll up properly and include all eligible individuals.

## 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 to set up different access to different sets of managers. For example, you select a formula that lets only managers at or above **Grade M4** make updates. It also specifies that all other managers in the source hierarchy get no access.

Changing the access level doesn't change the hierarchy.

**CAUTION:** If you select **Refresh default access level when you run the refresh data process** and access changes, the next time the refresh process runs, it resets access to the default.

### *Related Topics*

- [Workforce Compensation Plan Hierarchies](#)
- [Formula Type Is Compensation Hierarchy Determination](#)
- [Overview of Using Formulas](#)
- [HCM Trees](#)
- [How Line Managers Are Synchronized Using Position Hierarchy](#)

## Formula Type Is Compensation Hierarchy Determination

To build your own management or reviewer hierarchy for use in a workforce compensation plan, you can create formulas using the Compensation Hierarchy Determination formula type. You select the formula when you configure hierarchies for the workforce compensation plan.

Here's a comprehensive list of the contexts available to this type of formula:

- 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

The database items available for this type of formula are related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates.

These are the input variables available to this type of formula:

Input Value	Data Type	Required	Description
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_COMPONENT_ID	Number	Y	Component ID
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

These are the return variables available to this type of formula:

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

The **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes show this error when they can't find the assignment ID:

- Formula passed in an invalid person number <15465857>. Assignment ID couldn't be obtained.

This sample formula determines the manager of a person when the assignment\_id is passed.

```
/*****  
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 =====*/

```

#### Related Topics

- [Options to Configure Workforce Compensation Plan Hierarchies](#)
- [Formula Compilation Errors](#)
- [Formula Execution Errors](#)
- [When do I run the Compile Formula process?](#)
- [Example of Writing a Fast Formula Using Formula Text](#)

## Formula Type Is Compensation Default Access Level

To determine the access level for the selected workforce compensation plan hierarchy, you can create formulas using the Compensation Default Access Level formula type. You select formulas of this type on the Configure Hierarchies page.

Here's a comprehensive list of the contexts available to this type of formula:

- 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

The database items available for this type of formula are related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates.

These are the input variables available to this type of formula:

Input Value	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_PLAN_EXTRACTION_DATE	Date	Y	Plan Extraction Date
CMP_IV_HIERARCHY_TYPE	Char	Y	Hierarchy Type
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End 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
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERSON_ID	Number	Y	Worker ID

These are the return variables available to this type of formula:

Return Value	Data Type	Required	Description
UPDATABLE	Char	Y	Updatable
READONLY	Char	Y	Read-only
NOACCESS	Char	Y	No Access

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

```
/******  
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 =====*/

l_hr_assign_id = get_context(HR_ASSIGNMENT_ID, -1)
L_DEFAULT_VALUE='UPDATABLE'

IF l_hr_assign_id = 100000016858755
THEN
(
L_DEFAULT_VALUE = 'UPDATABLE'
)
ELSE IF l_hr_assign_id = 100000016873381
THEN
(
L_DEFAULT_VALUE = 'NOACCESS'
)
ELSE IF l_hr_assign_id = 300100009424371
THEN
(
L_DEFAULT_VALUE = 'READONLY'
)
ELSE
(
L_DEFAULT_VALUE = 'READONLY'
)

RET=ESS_LOG_WRITE('L_DEFAULT_VALUE: ' || L_DEFAULT_VALUE)
return L_DEFAULT_VALUE
/*===== FORMULA SECTION END =====*/

```

### Related Topics

- [Formula Compilation Errors](#)
- [Formula Execution Errors](#)
- [When do I run the Compile Formula process?](#)
- [Example of Writing a Fast Formula Using Formula Text](#)



# 38 Foundation: Plan Currency, Access, Feedback Survey, and Info in Workforce Compensation

## Workforce Compensation Plan Currency

You can let managers switch between the corporate currency, their preferred currency, and their people's local currencies. If you don't let people switch, then everyone sees monetary amounts in the corporate currency. You can also specify the default currency to show in plan worksheets. You can select how to display the currency in the worksheet. Options are currency code, currency name, and currency code and name.

Optionally, you can set a rounding rule to apply for a specified currency. For example, you want to round Euro (EUR) to nearest 10 and US dollars (USD) down to .01. These rules apply to any monetary columns that you enable in the worksheets when you set the column **Rounding Rule** to **Use Currency Rounding**.

Typically, you configure any rounding rules before running the **Start Workforce Compensation Cycle** process. For changes made during the cycle to take effect in the plan worksheets, you need to run the **Refresh Workforce Compensation Data** process.

### *Related Topics*

- [Enter Daily Rates Using the Daily Rates Spreadsheet](#)
- [Update Currency Rates](#)

## Workforce Compensation Plan Access

You can specify which job roles can and can't update workforce compensation plans when you configure plan access. When you set Restrict Access to Yes and don't do anything else, no one can see the plan, let alone update it.

To let people with the appropriate roles make plan updates, add the roles to the appropriate work area and set access to **Allow updates**. For example, you add the **Line Manager** role to the Workforce Compensation work area. You add the **Compensation Manager** role to the Compensation work area. And you allow both roles to make updates.

To let people with the appropriate roles only read the plan, add the roles to the appropriate work area. Also set access to **No updates allowed**. For example, you add reviewer roles to the Workforce Compensation work area and don't allow updates.

To let people with the appropriate roles set up plans, add the roles in the plan setup access section. Also set access to **Allow updates**. For example, you add the **Compensation Administrator** role to plan setup access and allow the role to make updates.

*Related Topics*

- [How Plan Access, Eligibility, and Default Access Level for Plan Hierarchies Work Together](#)
- [Workforce Compensation Security](#)
- [Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets](#)

## Delivered User Roles and Duty Roles

The tasks listed in the Compensation work area are the ones you need to administer workforce compensation plans. Depending on your role, you might have access to some or all of the tasks. For example, the Compensation Manager has access to worker data only, whereas the Compensation Administrator has access to plan configuration and setup data only.

Here are the delivered user roles you can assign to people, along with the duty roles, tasks and the entitlement that secures each task pane entry:

Role	Duty Role	Task Pane Entry	Entitlement
Compensation Manager	Compensation Manager Workforce	Act as Proxy	Manage Workforce Compensation When Acting as Proxy
		Administer Workers	Administer Workers for Workforce Compensation
	Compensation Management Duty	View Administration Reports	View Workforce Compensation Administration Reports
		Manage Global Models	Manage Workforce Compensation Global Models
Compensation Administrator	Workforce Compensation Setup Duty	Run Batch Processes	Run Group Compensation Batch Processes
		Manage Plans	Define Compensation Plan Definition
		Manage Active Plans	Manage Compensation Plan Definition
		Configure Global Settings	Manage Compensation Plan Global Options for Group Compensation
Compensation Analyst	Compensation Workforce Analysis Duty	View Administration Reports	View Workforce Compensation Administration Reports
		Manage Global Models	Manage Workforce Compensation Global Models

**Note:** These roles inherit other privileges that aren't directly related to Workforce Compensation plan administration. You can refer to the security reference manual for additional details.

# How Plan Access, Eligibility, and Default Access Level for Plan Hierarchies Work Together

You determine who can access workforce compensation plans when you configure plan eligibility, hierarchies, and access as part of the foundation plan setup.

## Plan Access Configuration

Your plan access configuration determines the roles that can and can't access the plan. By default, all roles can access.

## Plan Eligibility Configuration

Your plan eligibility configuration has the criteria that processes use to determine the individuals who are and aren't eligible for the plan. If the plan access configuration lets managers access the plan and the managers have subordinates eligible for the plan, the managers can see the plan. But if they don't have any subordinates eligible for the plan, the managers won't see the plan.

## Plan Hierarchies Configuration

Your plan hierarchies configuration determines the access level that managers have to the plan. If these conditions are met, the managers can see the plan and task worksheets:

- The plan access configuration lets managers access the plan.
- The managers have subordinates eligible for the plan.
- The default access level for the primary plan hierarchy is **Updates Allowed** or **No Updates Allowed**.

If the default access level is **No access**, the managers can't see the plan or task worksheets. This happens even if the other two conditions are met.

### *Related Topics*

- [Workforce Compensation Security](#)
- [Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets](#)

# Workforce Compensation Plan Feedback Survey

Let the people who use the plan to allocate workforce compensation during compensation cycles give you feedback on their experiences with the plan.

This feedback can help you determine if you need to further refine plans to different audiences, such as compensation administrators and line managers. It can also help you refine what task worksheets and reports to include, and what information to include in each worksheet and report. These kinds of changes help you improve productivity and satisfaction with the plans over time.

You can let people provide ratings for their experiences and include up to five survey questions. You can view survey responses using the **View Administration Reports** task.

*Related Topics*

- [Performance Considerations for Workforce Compensation Plans](#)

## Workforce Compensation Plan Information

You can provide additional information that administrators and managers might find useful when you configure plan information.

You can include important information, such as the manager due date and evaluation and plan access periods from cycle setup. You can also include text, for example, about new or updated compensation policies with links to relevant details.

This information shows up as a task in workforce compensation plans, in the area with the **Models and Reports** tasks.



# 39 Budgets: Budget Pools in Workforce Compensation Plans

## Overview of Budget Pools in Workforce Compensation Plans

You can align focal compensation for your people with organizational strategies and policies using budget pools. Add anywhere from zero to five budget pools to your workforce compensation plan.

For example, your plan has bonus, cost of living, merit, and stock compensation components. You can create two budget pools, one pool for the monetary allocations and one pool for the shares allocations. You can create a separate pool for each component. Or, you can use minimum and maximum options on the worksheet compensation components, explained in a later chapter, instead of setting up any pools.

To configure budget pools, you enable budgeting and then create the budget pools.

**CAUTION:** Any changes you make to an existing budget pool affects any open cycles. If you have an open cycle, you'll need to either update the status for all cycles to **Closed** in Active plans or run the **Back Out Workforce Compensation Data** process. After there are no open cycles, make your budget pool changes and then run the **Start Workforce Compensation Cycle** process.

### Related Topics

- [Budget Pools and Compensation Components](#)
- [Overview of Budget Display in Workforce Compensation Plans](#)

## Budgeting Methods in Workforce Compensation Plan Budget Pools

You specify whether budgets are worker or manager level when you configure budget pools.

### Manager-Level Budgeting

You can specify whether to store budget amounts or percentages, automatically publish budgets, and allow over budgeting for the linked plan compensation components. Then primary plan managers can set the budget method for the budget worksheet, either the first time they open the budget, or on the worksheet. They can pass down budgets to only their subordinate managers who report directly to them. Or, they can pass down budgets to all of their subordinate managers in the primary hierarchy. Their selection determines the worksheet that opens.

The summary table doesn't show any budget information when managers filter worksheets to see information for their subordinate managers two or three levels down. The summary table does show them a message that budget details

aren't available for this level of filtering, as appropriate. They can see summary budget information when they filter for their direct reports or all of their people.

## Worker-Level Budgeting

You can store only budget amounts and only automatically publish budgets. You can't allow over budgeting. You can also let managers monitor worker-level budgets and control spending by configuring a budget group.

### Related Topics

- [Include a Budget Group in a Compensation Task Worksheet Summary](#)

## Budget Storage Methods in Workforce Compensation Plan Budget Pools

You can store your budgets as amounts or percentages. The storage method you select affects published budgets when managers reassign people to other managers or change their eligibility status.

### Amounts

The published amounts stay with the manager when their total eligible salary changes, such as when they reassign people or change their eligibility status. For example, you publish a \$100,000 budget to David. David publishes budgets for himself and his direct reports, Rosa and Lee, as shown here:

Manager	Total Eligible Salary (USD)	Calculated Budget Percentage	Stored Budget Amount (USD)
David	100,000	10	10,000
Rosa	500,000	10	50,000
Lee	400,000	10	40,000
Total	1,000,000	NA	100,000

Then Lee reassigns one of his people with an eligible salary of \$100,000 to Rosa. This reassignment decreases his calculated budget percentage and increases Rosa's, as shown here. The stored budget amounts remain unchanged.

Manager	Total Eligible Salary (USD)	Calculated Budget Percentage	Stored Budget Amount (USD)
David	100,000	10	10,000
Rosa	600,000	8.3	50,000
Lee	300,000	13.3	40,000
Total	1,000,000	NA	100,000

## Percentages

The published budget amounts change when a manager's total eligible salary changes, such as when they reassign people or change their eligibility status. For example, you publish a budget to David as 10% of total eligible salary. David publishes budget percentages for himself and his direct reports, Rosa and Lee, as shown here:

Manager	Total Eligible Salary (USD)	Stored Budget Percentage	Calculated Budget Amount (USD)
David	100,000	10	10,000
Rosa	500,000	10	50,000
Lee	400,000	10	40,000
Total	1,000,000	NA	100,000

Then Lee reassigns one of his people with an eligible salary of \$100,000 to Rosa. Now Lee's total eligible salary decreases and Rosa's increases, affecting their calculated budget amounts, as shown here:

Manager	Total Eligible Salary (USD)	Stored Budget Percentage	Calculated Budget Amount (USD)
David	100,000	10	10,000
Rosa	600,000	10	60,000
Lee	300,000	10	30,000
Total	1,000,000	NA	100,000

### Related Topics

- [Budget Worksheet Actions](#)

## Automatically Publish Budgets in a Workforce Compensation Plan

You can specify whether the Start Workforce Compensation Cycle process automatically publishes budgets for manager-level budget pools. The process always publishes worker-level budget pools automatically.

Every time you run the **Start Workforce Compensation Cycle** process, it distributes the new or updated budget pools that have automatic publishing enabled. How the process distributes the budgets depends on how you setup key columns when you configure budget display. This setup is explained in more detail in the next chapter.

The option to automatically publish budgets also affects how managers can distribute budgets using models.

## Manager-Level Budgeting

The process distributes budgets as amounts to all managers with at least one subordinate manager when you set up these configurations:

- On the Summary tab, Table View, under Budget distribution, you can enable either the **Distributed Amount** or **Distributed Percentage** column, or both. The enabled columns appear in the top table of the budget worksheet, which shows the summary information for that primary plan manager's budget.
- On the Detail Table tab, under Budget Distribution, enable either the **Distributed Amount** or **Distributed Percentage** column, or both. The enabled columns appear in the bottom table on the budget worksheet. The table shows the budget information for each manager reporting to the primary plan manager.
- Optionally configure the column properties of only one of these four summary and detail columns to set a default value.

## Worker-Level Budgeting

The process distributes budgets as amounts or percentages at the worker level when you set up these configurations.

- On the Worker List tab, under Budget, enable either the **Budget Amount** or **Budget Percentage** column, or both.
- Optionally configure the column properties of only one of these columns to set a default value.

The manager-level budgets are the sum of the individual worker budgets.

## Models

If you configure models for the workforce compensation plan and enable automatic budget publishing, managers can publish budgets as part of their modeling. If you configure models but don't enable automatic budget publishing, managers can still use models to publish budgets. They have to take the extra step of going to the budget and publishing the model changes there.

## Budget Is in Nonmonetary Units for a Workforce Compensation Plan

You can specify the budget units when you configure a budget pool. If you don't select the Budget is in nonmonetary units option, the units are the corporate currency set for the plan, such as USD.

If you do select the option, you can specify the units, such as Days, Hours, Items, Shares, or Units.

### *Related Topics*

- [Nonmonetary Unit of Measure Lookups](#)

# Reset Amounts When Budgets Are Unpublished in a Workforce Compensation Plan

You can specify to reset amounts when budgets are unpublished, when you configure budget pools for a workforce compensation plan. When the primary plan manager unpublishes budgets, they reset summary and detail values.

## Summary View Table Changes

Managers can see the summary view table in the header area of their budget worksheet. If you enable reset amounts, the unpublish action decreases the **Budget Distribution Amount** and **Budget Distribution Percentage** values by the original budget distribution amount.

When managers change the **Budget Amount** to **0**, they're also decreasing these summary values by the same amount:

- Budget Distribution Amount
- Budget Distribution Percentage

And they're increasing the **Available for Distribution** value by that same amount.

## Detail Table Changes

Managers see the detail table in the main area of the budget worksheet. The table has separate rows for each of their subordinate managers, in a hierarchical representation. If you enable reset amounts, the unpublish action clears the **Budget Distribution Amount**, **Budget Distribution Percent**, and **Unpublished Amount** values in the detail section. It also sets the **Available Budget** to **0**.

## Examples

Here are example summary and detail tables for the **Merit** budget worksheet before the manager unpublishes the budget for a specific subordinate manager. The monetary amounts are in USD.

Summary Table Columns Before Unpublish

Eligible Salary	Budget Amount	Budget %	Budget Distribution Amount	Available for Distribution	Budget Distribution %	Unpublished Amount	Available Budget
3,667,253	110,018	3	110,018	0	3	30,990	110,018

Detail Table Columns Before Unpublish

Manager	Eligible Salary	Budget Distribution Amount	Budget Distribution %	Unpublished Amount	Available Budget
Direct Reports	763,300.36	22,899.01	3.00		22,899.01
Rosa	1,033,012.00	30,990.37	3.00	30,990.37	0

Manager	Eligible Salary	Budget Distribution Amount	Budget Distribution %	Unpublished Amount	Available Budget
Lee	1,174,646.00	35,239.38	3.00		35,239.38
Blair	696,294.36	20,888.83	3.00	20,888.83	20,888.83

Here are those same tables after the manager unpublishes Rosa's budget amount of 30,990.37.

#### Summary Table Columns After Unpublish

Eligible Salary	Budget Amount	Budget %	Budget Distribution Amount	Available for Distribution	Budget Distribution %	Unpublished Amount	Available Budget
3,667,253	110,018	3	79,027.63	0	0	30,990	141,008.37

#### Detail Table Columns After Unpublish

Manager	Eligible Salary	Budget Distribution Amount	Budget Distribution %	Unpublished Amount	Available Budget
Direct Reports	763,300.36	22,899.01	3.00		22,899.01
Rosa	1,033,012.00				0
Lee	1,174,646.00	35,239.38	3.00		35,239.38
Blair	696,294.36	20,888.83	3.00	20,888.83	20,888.83

## Budget Enforcement Options for Workforce Compensation Plan Budget Pools

You can let managers reward performance during the compensation cycle, beyond their allotted budgets. You can provide this controlled flexibility when you configure budget pools.

### Allow Over Budget When Budgeting

You can specify the maximum percentage over their allocated budgets managers can go when publishing budgets to their subordinate managers. Do this by enabling the **Allow over budget when budgeting** option.

## Allow Over Budget When Allocating Compensation

You can specify the maximum percentage over their allocated budgets managers can go when allocating compensation for their people. Do this by enabling the **Allow over budget when allocating compensation** option.

## Severity When Over Budget

You can specify whether to show warnings or errors when managers budget or allocate compensation between the published amount and the maximum overage. Managers get errors when they attempt to go over the maximum allowed overage.

## When Budget is Null

You can specify whether to show warnings or errors when managers try to budget or allocate compensation when there is no published budget.

## When Under Budget

You can specify whether to show warnings or errors when managers try to budget or allocate compensation under the published amount.

# Prevent Allocations When Budgets Are Null

When you configure a budget pool, you can prevent managers from submitting allocations before they're issued a budget when you select a rule from the **When Budget is Null** list.

In the **When Budget is Null** list, select the **Error preventing Save** rule when you have configured plans with the **Submit Mode** of **Disable submit** on the Configure Approvals and Notifications page in plan setup. You can also select to use this option and change the **Submit Mode** to **Disable submit** in Active Plans and then change it back after you've issued budgets.

Use the **Error preventing Save and Submit** rule when you configure plans with the **Submit Mode** of **Submit anytime** or **Only after approving all managers**.

If you enable modeling, you can use models to apply compensation amounts while budgets are null. Worksheet managers won't be able to make and save changes in the worksheet to applied amounts. If you've selected to have compensation amounts filled as a part of the Start process using default values or dynamic calculations, managers won't be able to make and save changes in the worksheet until you've issued a budget to them.

After you've issued a budget, configured budget validation rules apply.

# Budget Group Options for Workforce Compensation Plan Budget Pools

To track and monitor worker-level budgeting for specific populations, you can set up a budget group. The budget group lets you identify, for example, everyone in the same country or grade. You set up the group when you configure a budget pool.

## *Related Topics*

- [Include a Budget Group in a Compensation Task Worksheet Summary](#)



# 40 Budgets: Budget Display in Workforce Compensation Plans

## Overview of Budget Display in Workforce Compensation Plans

You determine the information that appears on the Manage Budget page and on the budget worksheet when you configure the budget display. You also determine the actions available on the worksheet and provide information that applies to the entire budget pool.

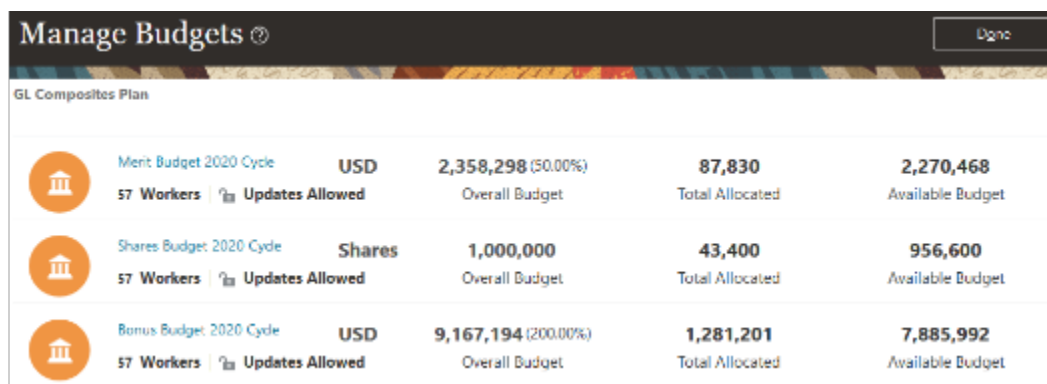
For example, you communicate policy changes that affect budget allocation and include links to detail information.




## Overview Configuration in Budget Display

You can enable the columns that appear as overview information in the budget row on the Manage Budgets page. You can also override the display name for some columns.

For example, you show the budget pool name and number of people eligible for the pool. And you change the **Workers** label to **Eligible People**.

When the budget is monetary, the **Units** value is the plan currency, such as **USD**. When the budget is nonmonetary, the **Units** value is whatever you selected for the budget pool, such as **Shares** for a stock budget.



Manage Budgets					
GL Composites Plan					
	Ment Budget 2020 Cycle	USD	2,358,298 (50.00%)	87,830	2,270,468
	57 Workers   Updates Allowed		Overall Budget	Total Allocated	Available Budget
	Shares Budget 2020 Cycle	Shares	1,000,000	43,400	956,600
	57 Workers   Updates Allowed		Overall Budget	Total Allocated	Available Budget
	Bonus Budget 2020 Cycle	USD	9,167,194 (200.00%)	1,281,201	7,885,992
	57 Workers   Updates Allowed		Overall Budget	Total Allocated	Available Budget

## Summary Configuration in Budget Display

You can enable the views that appear in the summary area of the budget worksheet, such as a scoreboard, a table, or both.

If you enable both views, you also specify which view appears by default when managers open the worksheet. Here's an example budget worksheet with only the table view enabled.

Allocate Budgets : Merit Budget 2020 Cycle

Currency: USD - US Dollar

Save and Close

Cancel

OL Composite Plan

Budget Pool	Currency	Eligible Salary	Budget Amount	Budget Percentage	Budget Distribution Amount	Budget Distribution Percentage	Available for Distribution	Unavailable Compensation Amount	Available Budget	
Merit Budget	USD	4,715,000	235,820	5	0	0	138,820	0	5,750	22,700

Budget Method: All managers bill

Workers: View | Format | Mask | Apply Budget | Publish to Managers

Manager	Currency	Units	Budget Worker Level	Eligible Workers	Eligible Salary	Budget Distribution Amount	Budget Distribution Percentage	Budget Distribution Amount	Budget Distribution Percentage	Unavailable Amount	Last Payout Date	Compensation Amount	Available Budget	Worker List
David Rogers	USD		Upwards Allowed	5	\$19,100.00							-60,215.40	10,215.40	
Anderson, Andy	USD		No Upwards	5	\$2,700.00							12,104.00	-13,104.00	
Full Corporate	USD		No Upwards	2									0.00	
PCBP_OVR_Sales_RTRM	USD		No Upwards	3	\$14,000.40							25,512.33	10,512.33	
PCBP_OVR_Mktg_Sales_RTRM	USD		No Upwards	5	\$25,000.00							11,440.00	-11,440.00	

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You can enable the columns that appear on the view and override all of the default display names. For example, you change **Budget Distribution Percentage** to **Budget Distribution %**. And you can override the default sequence of any column, as appropriate to best support how your managers expect their analytics. For the table view, use the **Refresh** icon on the Column Preview panel to see how the reordered columns will appear in the summary area.

You can also configure properties for the columns you enable, such as setting a rounding rule and the decimal places to display. The actual properties vary depending on the column. All columns include a **Plan Info** property that you can use to communicate useful information to managers. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio.

## Detail Table Configuration in Budget Display

You can enable columns from manager information, eligibility, budget distribution, targets, published budgets, and workforce allocation groups in the main table of the budget worksheet. You can also configure your own numeric columns for your enabled compensation components using the miscellaneous rate columns.

**Tip:** To prevent managers from inadvertently increasing their allocated budgets, don't enable the **Worker List** column for worker-level budgeting. If you do enable the column, managers can adjust the budget amounts for individuals, thus inadvertently increasing their allocated budgets.

## Display Names and Column Sequences

## Column Properties

All columns include a **Plan Info** property that you can use to communicate useful information to plan audiences. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio. When you include plan info for a column, people viewing the worksheet see a blue icon with an **i** in it on the column header. They click the icon or hover over it to see the information.

## Worker List Configuration in Budget Display

For example, you change **Budget Percentage** to **Budget %**. And you can override the default sequence of any column, as appropriate. Use the **Refresh** icon on the Column Preview panel to see how the reordered columns will appear in the table.

You can also configure properties for the columns you enable, such as setting a rounding rule or a default and override formula. The actual properties vary depending on the column. All columns include a **Plan Info** property that you can use to communicate useful information to managers. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio.

**Note:** If you don't enable the **Worker List** column on the Detail Table tab, the managers can't open the worker list page. Thus, they won't see any columns that you configure on the Worker List tab.

Allocate Budgets : Merit Budget 2020 Cycle

OL Composite Plan

Budget Pool	Currency	Eligible Salary	Budget Amount	Budget Percentage	Budget Distribution Amount	Budget Distribution Percentage	Available for Distribution	Unallocated Amount	Compensation Amount	Available Budget
Merit Budget	USD	4,715,000	235,5225	50	0	0	108,6250	0	5,750	22,70455

Budget Method: All managers btl.

Actions View Format Modes Apply Targets

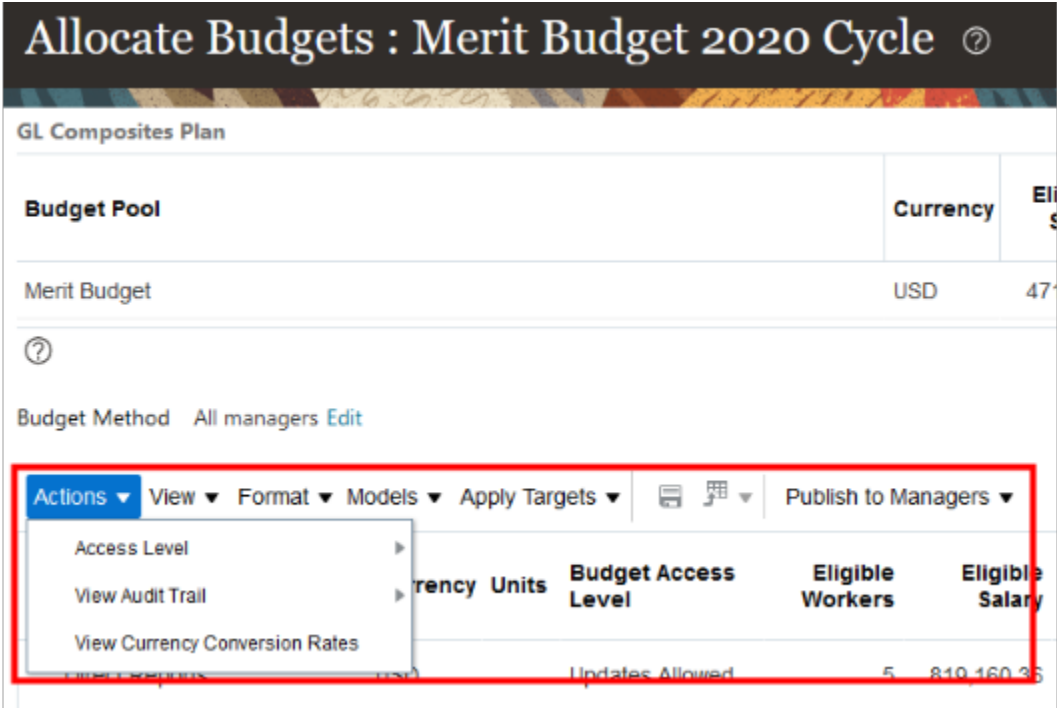
Manager	Currency	Units	Budget Access Level	Eligible Workers	Eligible Salary	Budget Distribution Amount	Budget Distribution Percentage	Budget Distribution Amount	Budget Distribution Percentage	Unallocated Amount	Last Payroll Date	Compensation Amount	Available Budget	Worker List
David Roberts	USD		Updates Allowed	3	515,100.00							-65,215.40	15,215.40	
Anderson, Andy	USD		No Updates	3	32,700.00							12,104.00	-18,104.00	
Not Complete	USD		No Updates	2									0.00	
2024P_CVRN_Sarah_RHWA	USD		No Updates	3	114,000.40							25,512.33	15,512.33	
2024P_CVRN_William_Sawyer	USD		No Updates	1	226,000.00							11,600.00	11,600.00	

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## Actions Configuration in Budget Display

You can specify the options available on the Actions, View, and Format menus and on the detail table toolbar when you configure the budget display.

You can also specify the actions available on the worker list page, such as **Request Eligibility Change** and **Reassign Workers to Another Manager**.



**Note:** If you don't enable the **Worker List** column on the Detail Table tab, the managers can't open the worker list page. Thus, they won't see any options that you configure on the Actions tab.

Related Topics

- [Budget Worksheet Actions](#)
- [Compensation and Promotion Worksheet Actions](#)
- [Performance Worksheet Actions](#)
- [Approval Worksheet Actions](#)
- [Communication Worksheet Actions](#)

## Information Configuration in Budget Display

You can provide managers with important budgetary information in the header of the budget worksheet when you configure the budget display.

For example, you can explain policies that apply to the budgets for the upcoming focal compensation cycle and include links to details. You can also show important underlying calculations used to determine the results in various columns.



# 41 Worksheets: Overview and Basic Configuration Processes for Key Columns and Actions

## Overview of Task Worksheets in Workforce Compensation Plans

Compensation administrators optimize compensation budgets and allocations across their client groups using task worksheets in workforce compensation plans. Managers and specialists also use task worksheets to propose compensation, performance ratings, promotions; to approve proposed changes; and to communicate the changes.

You can vary the worksheets that you include in a plan to best support the plan audience in their compensation tasks. Worksheets consist almost entirely of columns and actions. When you configure the page layout for a task, you enable summary views and columns, detail table columns, and detail table actions.

- Configuration can be straightforward, such as enabling the **Personal > Country** column.
- Configuration can involve interdependencies, such as between actions and columns. For example, to let managers rank their people, you need to enable the **Performance > Ranking** column in the detail table. You also need to enable the appropriate rank worker actions. And to let managers see full details about someone's ranking, you need to enable the **Right Click Menu > View Ranking Details** action.

For all worksheet columns, you can set column properties. The available properties depend on the column.

Type	Examples
General	Column shading, rounding rule, and decimal precision.
Visibility and access	Line managers can only read the column data but compensation administrators read and edit it.
Default value	A specific number or text; or values provided by a specified formula, compensation derived factor, or from a cross-referenced column.
Salary and element mapping	Post a single payment or base pay adjustment and select the payroll element to use.
Information	The formula or dynamic column condition used to determine the column amounts or the source of the column data.

For many columns, you can also build dynamic conditions, for example, to ensure that proposed changes don't exceed existing compensation by a specific maximum.

To include data not already available in the provided columns, you can enable and configure miscellaneous rate and user-defined columns. For example, you can use user-defined columns to share external data, such as market data supplied by third parties.

While you can go straight to configuring worksheet columns as part of configuring worksheet displays, it's worth completing other, related configurations first. Here are some examples of configurations with interdependent configuration tasks:

- Include prorated values for relevant worksheet columns by setting up assignment segment options.
- Specify how to determine local currencies for a compensation component, and if the component units should be nonmonetary, such as **Days** or **Shares**.
- Share performance ratings and changes between Oracle Fusion Performance Management Cloud Service and compensation plan worksheets.
- Designate review hierarchies that are separate from the primary manager hierarchy. Also override any global notification settings, as appropriate for the specific plan. For example, you have a global setting for how everyone publishes and withdraws budgets, but want to change the settings for a specific plan.
- Specify how to generate and store statements that managers use to communicate compensation changes to their people.
- Build and enable the alerts that plan worksheets need to include.

You configure plan worksheets using the **Workforce Compensation Plans** task, **Worksheets** task list in the **My Client Groups > Compensation** work area. The other topics in this chapter have the basic processes to fully configure alerts, compensation change statement, compensation component, and performance rating columns. It also has basic processes to fully configure worksheet models and filters for worksheets and reports. The following chapters have information about each task in the **Worksheets** task list.

## Reference

For descriptions of every worksheet column and action, see Workforce Compensation Worksheet Configuration Definition (document ID 1450891.1) on My Oracle Support (support.oracle.com). To help you locate columns and actions, the document tabs organize information in the same groupings as the Configure Worksheet Page Layout pages.

For columns, the document has this information:

- The navigation path for columns that map directly to a field in Oracle Fusion Global HR Cloud Service
- If you can default column values using a plan cross-reference
- If people can update the values in their plan budget and task worksheets

For actions, it tells you about any dependent configurations you need to complete.

### *Related Topics*

- [Overview of Worksheet Display in Workforce Compensation Plans](#)
- [Miscellaneous Rate Component Columns and User-Defined Columns](#)
- [Performance Considerations for Workforce Compensation Plans](#)
- [Overview of Workforce Compensation Plan Configuration](#)

## Include Alerts in Task Worksheets

Here's the basic process to include alerts in the task worksheets of a workforce compensation plan:

1. Enable predefined alerts as well as create and enable your own alerts using the **Configure Alerts** task. All of the enabled alerts for the plan appear in the enabled **Alert** column of every enabled worksheet when the alert



conditions are met. You can't enable different alerts for different worksheets. You can elect to not complete step 3 for various worksheets.

2. Enable the task worksheet using the **Configure Worksheet Display** task.
3. Enable Alerts column in the Alerts column group of the detail table using the Configure Task Layout icon.

#### Related Topics

- [Overview of Alerts in Workforce Compensation Plan Worksheets](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Overview of Worksheet Display in Workforce Compensation Plans](#)

## Include a Budget Group in a Compensation Task Worksheet Summary

Here's the basic process to include a budget group in the summary of a compensation task worksheet, in a workforce compensation plan:

1. Enable a compensation task worksheet using the **Configure Worksheet Display** task.
2. Complete these steps using the **Configure Task Layout** icon.

- a. On the Summary tab, enable the group view. Optionally change the Group column display name to reflect the grouping criteria, such as **Location** or **Grade** and **Country**.

If you enable the analytic view, you can also enable group view for that summary information.

- b. On the Detail Table tab, enable the column you want to use as a group, such as **Personal > Country** or **Employment > Location**. To reference data not in the available columns through a fast formula or dynamic calculation, you can enable and configure a user-defined text column. For example, to use a formula to prevent managers from crossing budget limits or to track budgets by both **Grade** and **Country** columns.

You can't use these kinds of columns for grouping: person number, email, worker number or name, date, updated by, performance management rating, or numeric.

Grouping columns show only the first 150 characters of text.

3. Create the budget pool or edit an existing pool using the **Configure Budget Pools** task.
  - a. Enable worker-level budgeting.
  - b. Set the applicable column as the grouping column.
  - c. Optionally enforce budgets by grouping column and set a maximum percentage over allocation. You can also set the severity when people go over budget, such as **Error** or **Warning**.

#### Related Topics

- [Configure the Summary Display for Compensation Task Worksheets](#)
- [Detail Table Configuration in Budget Display](#)
- [Guidelines to Configure the Budget Amount - Worker Component Columns](#)
- [Miscellaneous Rate Component Columns and User-Defined Columns](#)

## Include Compensation Change Statements in Task Worksheets

Here's the basic process to include compensation change statements in the communication task worksheets of a workforce compensation plan:

1. Configure what changes you want managers to communicate and how they communicate the changes using the **Configure Compensation Change Statements** task.
2. Enable a communications task worksheet using the **Configure Worksheet Display** task.
3. Enable the applicable summary columns and the applicable actions using the **Configure Task Layout** icon.

### Related Topics

- [Overview of Compensation Change Statements in Workforce Compensation Plan Worksheets](#)
- [Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets](#)
- [Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Overview of Worksheet Display in Workforce Compensation Plans](#)

## Include Compensation Component Columns in Task Worksheets

Here's the basic process to include compensation component columns in the worksheet summary views and detail tables of a workforce compensation plan:

1. Configure up to five compensation components using the **Configure Compensation Components** task.
2. Enable a task worksheet using the **Configure Worksheet Display** task.
3. Complete these steps using the **Configure Task Layout** icon:
  - a. Enable the components to include in summary views, the relevant summary views, and the applicable component columns.
  - b. Enable applicable columns in the component column groups of the detail table.

To post the approved plan changes as salary updates or element entries, be sure to enable the **Compensation Amount** column for at least one component. You also need to set the salary and element mapping properties for the column.

### Related Topics

- [Compensation Components in Workforce Compensation Plan Worksheets](#)
- [Configure the Summary Display for Compensation Task Worksheets](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Guidelines to Allocate Compensation as Percentage of Budget](#)
- [Guidelines to Configure the Budget Amount - Worker Component Columns](#)

## Include Filters in Task Worksheets and Plan Reports

Here's the basic process to include filters in the task worksheets and reports of a workforce compensation plan:

1. Enable a task worksheet using the **Configure Worksheet Display** task.
2. Enable the corresponding detail table columns. For example, you want to let people filter by country and job. You need to enable the **Country** column in the **Personal** group and the **Job** column in the **Employment** group.
3. Enable the **Filters** action using the **Configure Task Layout** icon.
4. Enable the appropriate filters using the **Configure Filters** task. All of the filters that you enable for the plan appear on the worksheet and report Filters dialog box. You can't enable different filters for different worksheets and reports in the same plan. You can elect to not complete step 2 for various worksheets.

### Related Topics

- [Overview of Filters in Workforce Compensation Plan Worksheets and Reports](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Overview of Worksheet Display in Workforce Compensation Plans](#)

## Include Models in Task Worksheets

Here's the basic process to include models in the task worksheets and reports of a workforce compensation plan:

1. Enable a task worksheet using the **Configure Worksheet Display** task.
2. Enable **Models** actions, such as **Model - Create Model**, **Model - Open Model**, and **Model - Apply Model**, using the **Configure Task Layout** icon.
3. Enable model access, sharing restrictions, usage, and allocation methods using the **Configure Models** task. All of the settings that you enable appear on the worksheet and report Filters dialog box. You can't enable different filters for different worksheets and reports in the same plan. You can elect to not complete step 2 for various worksheets.
4. Enable the modeling criteria you want to let people select from, such as **Country** and **Job** using the **Configure Report Dimensions and Modeling Criteria** task. You can use delivered dimensions and define your own dimensions using delivered job attributes, grade attributes, user-defined worksheet columns, and compensation attributes.

### Related Topics

- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Overview of Modeling in Workforce Compensation Plan Worksheets](#)
- [Dimensions and Range Increments in Worksheet Models and Plan Reports](#)
- [Overview of Worksheet Display in Workforce Compensation Plans](#)

## Include Performance Rating Columns in Task Worksheets

Here's the basic process to include performance columns in task worksheets of a workforce compensation plan:

1. Optionally configure performance management ratings, compensation performance ratings, or both using the **Configure Performance Ratings** task.
2. Enable a task worksheet, ideally of type **Performance** using the **Configure Worksheet Display** task.
3. Complete these steps using the **Configure Task Layout** icon:
  - a. Enable a task worksheet, ideally of type **Performance**. Optionally enable the **Performance Rating** summary column of the performance task worksheet.
  - b. Enable at least one performance management rating or compensation rating column in the detail table. These columns are in the **Performance** column group.

### Related Topics

- [Overview of Performance Ratings in Workforce Compensation Plan Worksheets](#)
- [Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)

## Notify People of Eligibility Changes, Reassignments, and Delegation Changes in a Workforce Compensation Plan

Here's the basic process to notify plan managers and other reviewers of individuals' eligibility changes, reassignments, and delegation changes in a workforce compensation plan. The initial, saved changes appear as alerts in the relevant worksheets. When the changes are approved, the managers and reviewers get FYI notifications.

1. In each of the enabled task worksheets, enable these actions using the **Configure Worksheet Display** task:
  - Request eligibility change
  - Reassign workers to another manager
  - Manage delegations
2. Select **Approval required** for these notification settings using the **Configure Global Setting** task:
  - Eligibility Changes
  - Worker Reassignments
  - Delegate Worker
  - Remove Worker Delegation

*Related Topics*

- [Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Global Setting Options for Workforce Compensation Plan Notifications](#)
- [How Workforce Compensation Plan Notifications Work](#)
- [Header and Message Text for All Workforce Compensation Plan Notifications](#)



# 42 Worksheets: Compensation Component

## Compensation Components in Workforce Compensation Plan Worksheets

Compensation components are the building blocks of workforce compensation plans. You can handle all types of allocation, such as merit increases, bonus awards, and stock grants by configuring up to five separate components.

For example, you create one monetary component for merit increases, another monetary component for bonus awards, and a nonmonetary component for stock grants.

While you can go straight to configuring component columns as part of configuring worksheet displays, it's worth configuring the necessary compensation components first. Here's what you can do when you configure compensation components that you can't do when you configure worksheet displays.

- Specify how to determine local currency, which is especially important if you enabled currency switching in the plan currency configuration. For example, you want to use the currencies from input values of payroll elements or from salary bases.
- Set nonmonetary the unit of measure for the component, such as **Days**, **Hours**, **Shares**, or **Units**.
- Link budget pools to manager allocations to align the allocations with organizational policies.
- Include prorated values for the relevant worksheet columns by setting up assignment segment options.

**Tip:** You need to configure assignment segments first, using the **Configure Assignment Segments** task, before you can link them to a component.

The component columns that you enable in task worksheets inherit these compensation component settings.

### Related Topics

- [Compensation Component Number and Name, and Detail Table of Worksheet Display](#)
- [Include Compensation Component Columns in Task Worksheets](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)

## Compensation Component Number and Name, and Detail Table of Worksheet Display

When you configure a compensation component, you select the component number and enter a name. The number and name let you identify the corresponding component columns on the Detail Table tab when you configure the worksheet display for a task.

For example, you configure these compensation components:

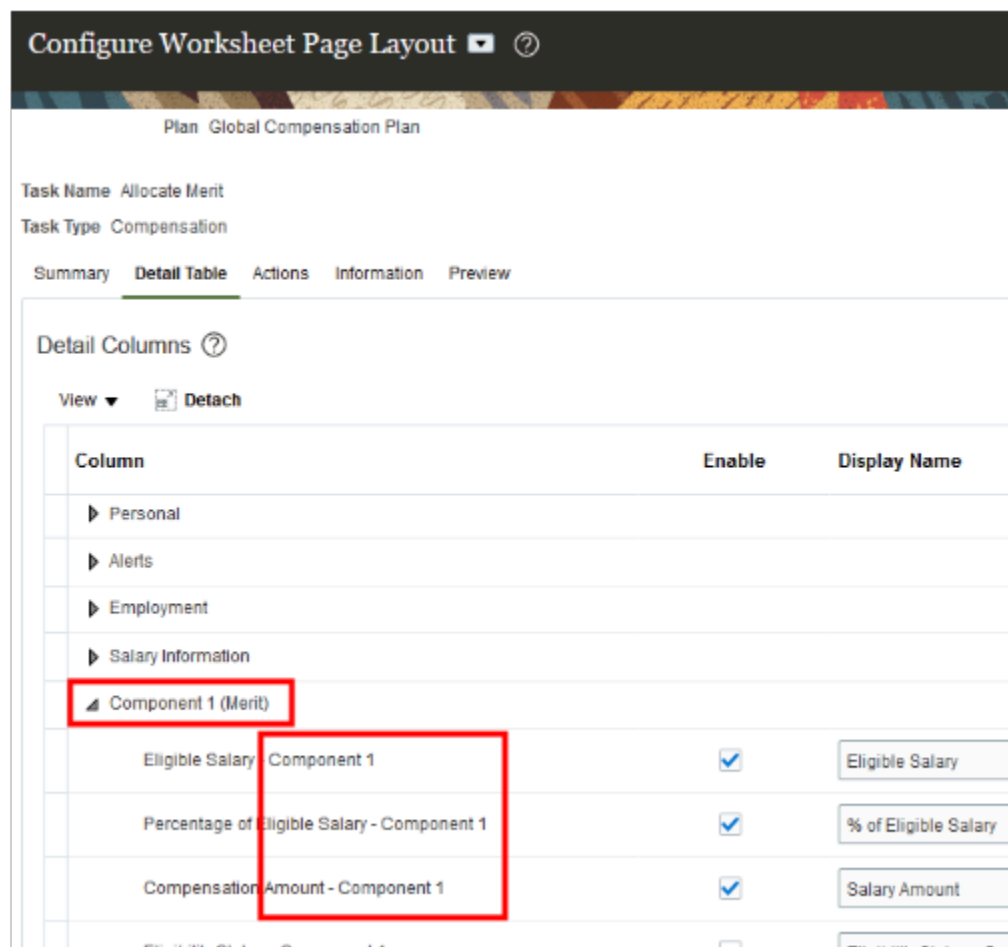
Name	Component Number
Bonus	2
Merit	1

On the Detail Table tab, the appropriate column group name has the component name appended, such as **Component 1 (Merit)** and **Component 2 (Bonus)**. And the names of the individual columns in a component group all end with the component number. This suffix lets you know which compensation component you're configuring. The suffix is especially important when you scroll down enough that you can't see the column group name anymore. Here are some examples of monetary component column names:

Component 1 (Merit) Column	Component 2 (Bonus) Column
Eligible Salary - Component 1	Eligible Salary - Component 2
Percentage of Eligible Salary - Component 1	Percentage of Eligible Salary - Component 2
Compensation Amount - Component 1	Compensation Amount - Component 2

Here's an example Detail Table tab showing these same column group name and individual column names for compensation component 1.





#### Related Topics

- [Include Compensation Component Columns in Task Worksheets](#)

## How the Compensation Component Display Order Affects Task Worksheets and Administrator Reports

You can specify the order that compensation components show in the summary areas of task worksheets. It also determines their order in the Component choice list on administration reports.

Do this by setting the display order when you configure the compensation component. In summary views other than the table view, managers can use the **X of Y** link and **Previous** and **Next** icons to move between components. For example, in the score board or analytic summary view of the **Reward** compensation worksheet, a manager clicks the **1 of 3** link.

You set the display order when you configure the compensation component. The display order can mirror the component number, but it can also be different. Here's an example of when they match:

Name	Component Number	Display Order
Bonus	2	2
Salary - Merit	3	3
Stock	1	1

And here's an example of how they can be different:

Name	Component Number	Display Order
Bonus	3	2
Salary - Merit	2	1
Stock	1	3

Here's an example of what managers see in the summary table view of a compensation task worksheet:

Reward

Currency USD

Annual Compensation Plan 2021

Refer to Corporate Compensation Guidelines when allocating merit and incentive awards to your team.

Summary: Direct Reports

Component	Currency or Units	Eligible Workers	Number of Workers Compensated	Percentage of Workers Compensated	Overall Budget	Overall Available Budget	Eligible Salary	Comp Amount (F by
Salary - Merit	USD	8	7	88	113,972.04	66,566.41	440672	12
Bonus	USD	8	7	88	144,656.83	125,753.03	440672	18
Stock	Shares	8	7	88	1,250,000.00	1,237,250.00	0	3

Actions

View

Format

Detach

Models

Apply Targets

Direct Reports

Name Search

Worker Name	Alerts	Job	Comp History	Job History	Market Composites	Merit Eligible Salary	Merit Amount	Merit Percentage
Gilbert, Simon		Human Resour... Admins...				21,979.61	0.00	0.0
Joseph, Brian		Director of Payroll				79,994.16	3,999.71	5.0
Majors, Rosa		Labor Relations Manager				85,000.00	850.00	1.0
Mattran, Guv		Analyst				29,290.00	1,757.40	6.0

Here's an example of the **Component** choice list on the **Compensation Allocations** administration report:

**Administration Reports: Compensation Allocations**

Plan: Annual Compensation F

Component: Salary - Merit

Filters

Summary Details

View Format Freeze Detach Wrap Currency Worker local currency

Legal Employer	Currency	Worker Count				Workers with Compensation	Work An
		Eligible Workers	Ineligible Workers	Total Workers			
Algeria Legal...	USD - US Dollar	9	0	9	0		
Argentina Le...	USD - US Dollar	9	0	9	0		
Australia HE ...	AUD - Austral...	29	0	29	28	31.2	
Australia Len	AUD - Austral...	25	0	25	21	46.3	

## Local Currency Determination for Compensation Components

When you configure a compensation component, you need to specify how the component determines local currency. Here's the local currency source for each available option:

Option	Source of the Local Currency	Usage Example
Corporate	The configured plan currency	Monetary changes are all in the corporate currency
Element Input	The input currency for the payroll element mapped to the Component Amount column of the compensation component, such as <b>Compensation Amount - Component 1</b>	Bonuses
Legal Employer	The currency defined for the individual's legal employer	Salary adjustments, such as merit or cost of living increase, when the currency of the legal employer is different from the salary basis currency
Salary Basis	The input currency for the payroll element of the salary basis linked to the individual's employment record	Salary adjustments, such as merit or cost of living increase
Formula	The currency retrieved by the specified formula from some other source	When none of the other options fit your business requirements

**Tip:** To prevent data corruption, you can't change the **Local Currency Determination** selection after you run the **Start Workforce Compensation Cycle** process. You have to set all plan cycles to **Closed** or run the **Back Out Workforce Compensation Data** process. Then change the local currency determination and run the **Start Workforce Compensation Cycle** process again.

#### *Related Topics*

- [Workforce Compensation Plan Currency](#)
- [Salary and Element Mapping Properties of Compensation Amount Columns](#)
- [Back Out and Purge Workforce Compensation Data Processes](#)
- [Formula Type Is Compensation Currency Selection](#)
- [Overview of Using Fast Formulas](#)

## Nonmonetary Units for Compensation Components

By default, the units of measure for the amount columns of the compensation component are monetary. You can specify that the columns use a nonmonetary unit for amounts when you configure the compensation component. For example, you can select Days, Items, Shares, or Units.

## Budget Pools and Compensation Components

To align a compensation component with organizational strategies and policies, you can select a budget pool. You can even select the same budget pool for multiple compensation components.

For example, your plan includes the Merit, Bonus, and Market Adjustment compensation components that you can configure with the Monetary Allocation budget pool.

For budget values to increase and decrease according to managers' allocations, you need to link the budget pool to a compensation component. Any budget pool that you create for the plan and don't link to a compensation component just shows static budgetary information.

### Primary Component for Budgeting

When you have multiple components with the same budget pool, you need to select **Primary component for budgeting** for one of the components. The salaries of the people who are eligible for the primary component determine the total eligible salaries used for their managers' budgeting.

For example, of the three configured components, you make **Merit** the primary budgeting component. The total eligible salaries for managers' budgeting include the salaries of their people who're eligible for **Merit**. The totals exclude their people who are eligible for **Bonus**, **Market Adjustment**, or both, but aren't eligible for **Merit**.

#### *Related Topics*

- [Overview of Budget Pools in Workforce Compensation Plans](#)

## How You Let Managers Track Off-Cycle and On-Cycle Compensation Against a Budget

Here's how you can enable managers to track off-cycle and on-cycle awards when they review their budget pool.

1. Create the workforce compensation plan using the **Workforce Compensation Plans** task in the Compensation work area.
  - a. Configure the plan details.
  - b. Configure the budget pool.
  - c. Create at least one worksheet compensation component and associate the budget pool with it.
  - d. Run the **Start Compensation Cycle** process.
2. After you start the compensation cycle, associate the budget pool with an individual compensation plan option. Use the **Individual Compensation Plans** task in the Compensation work area. Select the budget pool when you add or edit the relevant plan option.

## Configure Assignment Segments Options of a Compensation Component

You can include prorated values for relevant component worksheet columns. Do this by setting up assignment segment options for only one of the compensation components configured for the compensation cycle. Don't enable assignment segments for a component that you're mapping to salary rates.

1. On the create or edit component dialog box for the appropriate compensation component, select **Component for assignment segments**. For example, you want to prorate bonus allocations, so you enable the **Bonus** compensation component for assignment segments.
2. Select an amount column for assignment segments, either the **Compensation Amount** column or a miscellaneous rate column for the component. This selection lets you feed the assignment segment total to a column that managers see in their summaries.

The amount could have additional calculations done on it before it's passed to payroll element entries. For example, you select a miscellaneous rate column for the assignment segment. The value in that rate column could be part of a dynamic calculation configured on the compensation amount column. The calculation could increase or decrease the rate column value further.

**CAUTION:** Don't select a column that you're configuring with a dynamic calculation or a default value. Specifying the column as an assignment segment takes precedent over any other configurations for that column, and the other configurations are ignored.

The selected column shows as read-only in any task worksheets with the column enabled. If you select the compensation amount column, these columns are also read-only in any worksheet where you enable them:

- Percentage of Eligible Salary
- Percentage of Budget Pool

3. Specify whether to publish the total segments amount to the selected amount column by default when you run the **Start Workforce Compensation Cycle** process.

#### *Related Topics*

- [Overview of Assignment Segments in Workforce Compensation Plan Worksheets](#)
- [Basic Process to Configure Worksheet Assignment Segments](#)

## Eligibility Profiles of Compensation Components

As part of the foundation configuration tasks, you configure plan eligibility to identify the people who are eligible and ineligible for the plan.

You can also add eligibility profiles to compensation components to determine who is eligible and ineligible for the components. The component-level eligibility considers only the people whose status the plan-level eligibility configuration set to **Eligible**. It ignores everyone whose plan-level status is **Ineligible** or **Limited**.

### Assignment Segments

If you enable the **Component for Assignment Segments** option, the component eligibility also determines segment eligibility. Managers can update compensation values for only people who're eligible for a segment. They can only read the segment values in these situations:

- Their people are ineligible for the segment.
- The person's assignment is processed or partially processed.
- The manager has read-only access to the worksheet.

Administrators can see all assignment segment columns, update all segment values, and update any segment eligibility using the **Administer Workers** task. You can also change segment eligibility by changing the external data and then running the **Refresh Workforce Compensation Data** process.

#### *Related Topics*

- [Workforce Compensation Plan Eligibility](#)
- [How Required and Optional Profiles Determine Compensation Eligibility](#)
- [Configure User-Defined Columns of a Workforce Compensation Plan Worksheet to Show External Data](#)

## Eligibility Profile Testing for a Compensation Component

You can test how long it takes to evaluate the eligibility profiles in compensation component configurations and view test results. The test lets you select a cycle, a sample person, and an active assignment for your test.

Data security applies, so the person and assignment you can see for the cycle depend on your privileges. If profile criteria includes fast formula, you can see if it worked correctly by reviewing the formula logs.

## Formula Type Is Compensation Currency Selection

To determine the local currency for a workforce compensation component, you can create formulas using the Compensation Currency Selection formula type.

Here's a comprehensive list of the contexts available to this type of formula:

- 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

The database items available for this type of formula are related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates.

These are the input variables available to this type of formula:

Input Value	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_COMPONENT_ID	Number	Y	Component 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

Input Value	Data Type	Required	Description
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

These are the return variables available to this type of formula:

Return Value	Data Type	Required	Description
L_CURR_CODE	Char	N	Currency code from the formula

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

```

/*****
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 = 'GBP'
)
RETURN l_curr_code
/*===== FORMULA SECTION END =====*/

```

#### Related Topics

- [Formula Compilation Errors](#)
- [Formula Execution Errors](#)
- [When do I run the Compile Formula process?](#)
- [Example of Writing a Fast Formula Using Formula Text](#)



# 43 Worksheets: Performance Ratings

## Overview of Performance Ratings in Workforce Compensation Plan Worksheets

While you can go straight to configuring performance rating columns as part of configuring worksheet displays, it's worth configuring performance ratings first. Here's why:

- You can include development and performance goal ratings from Oracle Fusion Performance Management Cloud Service in your task worksheets. And these ratings get updated automatically when managers save their rating changes in their worksheets during the workforce compensation cycle.
- You can share compensation performance ratings among plan managers and optionally specify the rating model for them to use. For example, select a model that indicates level of interest, level of performance, or proficiency in competencies.

You can also use both integrated Performance Management ratings and compensation performance ratings. For example, your managers used Performance Management to rate their people several months before the compensation cycle started. Now you want the managers to make sure that their people's current and past performance is meeting expectations.

### *Related Topics*

- [Workforce Compensation Plan Cycle Dates](#)
- [Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)

## Performance Management Ratings in Workforce Compensation Plan Worksheets

You can share development and performance ratings and documents from Oracle Fusion Performance Management Cloud Service with managers in task worksheets for workforce compensation plans.

These ratings update automatically when managers save their rating changes in their plan worksheets. Managers can even set ratings for the first time in a task worksheet as long as the performance document exists in Performance Management.

You can enable this integration when you configure performance ratings and later, when you enable development and performance rating columns when you configure worksheet displays.

## Test Performance Document

You can test your performance document and rating data on the same configuration page. You don't have to wait until you start a workforce compensation cycle for the plan.

### *Related Topics*

- [Workforce Compensation Plan Cycle Dates](#)
- [Include Performance Rating Columns in Task Worksheets](#)
- [Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)

## Reasons to Set Performance Document Properties

By default, managers see the most recent manager-submitted ratings and corresponding performance documents, if they exist, when they open the relevant task worksheet.

If your managers can have many people reporting to them, the default behavior can significantly affect their worksheet performance. And depending on how regularly people use Performance Management, people's most recent ratings and documents could be from years ago. Managers won't see this in the rating columns, but they can see it in the performance document. Thus, you may want managers to consider specific ratings and performance documents when proposing changes for the workforce compensation plan.

You can override the default behavior by setting performance document properties when you configure performance ratings that integrate with Oracle Fusion Performance Management Cloud Service.

### *Related Topics*

- [Workforce Compensation Plan Cycle Dates](#)

## How the Performance Template Selection Affects Other Document Properties

You can set performance document properties when you configure performance ratings that integrate with Oracle Fusion Performance Management Cloud Service. A key property is the performance template selection.

## Template and Document Type

You can show specific kinds of ratings by selecting a performance template, such as **Competency Progress** or **Annual 360 Evaluation with Development Goals**. If the template has a corresponding document type, selecting the template also sets the performance document type. For example, you select **Annual 360 Evaluation with Development Goals**, which sets the performance document type to **Annual Evaluation**.

## Template and Timing Options

You can show only ratings and documents for a specific template and period. When you select a performance template, you make the **Timing** options available, including **Period Specific**. Selecting **Period Specific** makes the **Period Name** choice list available so you can select the appropriate period. These choice list values change depending on your template selection.

If a person doesn't have any ratings or document for that period, the relevant columns in the worksheet are empty.

## Timing Period Name and Review Period

The template **Period Name** choice list values also change if you set a review period. If you want to use a review period and a specific template period, set the review period before you set the period name. Setting the review period after the period name also removes the period name and you need to set the name again. This removal happens even if the period name you selected would be the only choice list value if you set the review period first.

### *Related Topics*

- [Workforce Compensation Plan Cycle Dates](#)
- [How Performance Document Components Work Together](#)

# Compensation Performance Ratings in Workforce Compensation Plan Worksheets

You can let managers share the performance ratings that don't transfer to Oracle Fusion Performance Management Cloud Service or HR.

They share their ratings in task worksheets across the primary, secondary, and reviewer plan hierarchies as they allocate workforce compensation during the current compensation cycle.

You can enable compensation ratings when you configure performance ratings. Then you specify whether managers rate people using a choice list or stars. You determine the scale used for the choice list or stars with the rating model that you select. You can also create a rating model, as needed.

### *Related Topics*

- [Include Performance Rating Columns in Task Worksheets](#)
- [Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Rating Models](#)



# 44 Worksheets: Approvals and Notifications

## Configure Approvals for Workforce Compensation Plan Worksheets

By default, managers allocating compensation with a workforce compensation plan can submit their changes to the plan at any time. And managers higher in the primary plan hierarchy can approve their subordinate managers' plan changes at any time.

You can change the plan approval and submission modes when you configure approvals. You can also identify an alternate approval hierarchy to use instead of the primary plan hierarchy.

### Related Topics

- [Workforce Compensation Plan Hierarchies](#)
- [Options to Configure Workforce Compensation Plan Hierarchies](#)
- [Considerations for Securing Access to Workforce Compensation Plans and Task Worksheets](#)
- [How You Let Managers Track Off-Cycle and On-Cycle Compensation Against a Budget](#)

## Approval Modes in Worksheet Approvals Configuration

You specify when managers can approve their subordinate managers' plan changes with the Approval Mode option you select when you configure approvals.

Mode	Description
You specify when managers can approve their subordinate managers' plan changes with the Approval Mode option you select when you configure approvals.	Let subordinate managers complete their allocations before higher-level managers can approve subordinate changes because their approvals make the plan unavailable to their subordinate managers.
Approve anytime (default selection)	Higher-level managers can approve their subordinate managers' plan changes at any time during the period the plan is available to the higher-level managers.
Disable approvals	Approvals aren't required and higher-level managers don't have the <b>Approve</b> and <b>Return for Correction</b> actions available to them.

You can change the approval mode after the **Start Workforce Compensation Cycle** process runs using the **Active Plans** task.

## Submit Modes in Worksheet Approval Configuration

You specify when managers can submit their plan changes with the Submit Mode option you select when you configure approvals.

Mode	Description
All managers must be approved	Starting at the lowest tier of the hierarchy, managers need to review and approve plan changes submitted by their direct reports. Then the current tier of managers can submit their own plan changes for approval.
Submit anytime (default selection)	Managers can submit their plan changes at any time during the period the plan is available to them.
Disable submit	Managers can only save their plan changes. The <b>Submit</b> action isn't available for the plan.

## Withdraw Modes in Worksheet Approvals Configuration

You specify when managers can withdraw their plan changes with the Withdraw Mode option you select when you configure approvals.

### *Withdraw Modes in Worksheet Approvals Configuration*

Mode	Description
Withdraw anytime (default selection)	Managers can withdraw their plan changes at any time during the period the plan is available to them.
Disable withdraw	Managers can't withdraw their plan changes after they submit them.

Higher level managers or administrators need to use the **Return for Correction** option to return a worksheet to a manager if they need to make changes to a plan.

## Alternate Approver Table in Worksheet Approval Configuration

By default, the approval hierarchy for a workforce compensation plan is the primary plan hierarchy. To have people other than primary plan managers handle approvals, select an alternate approver table when you configure approvals for worksheets.

Typically, you use alternate approver hierarchies when you transition approval control from managers to the HR department.

You can set an alternate approver for a specified worksheet manager when you create the alternate approver table. The worksheet manager options come from the primary plan hierarchy. The alternate approver that you select replaces the person who would otherwise approve plan changes submitted by the specified worksheet manager. The alternate approver doesn't replace the specified worksheet manager in the approval hierarchy. Thus the alternate doesn't approve plan changes that the specified worksheet manager normally approves.

Each alternate approver approves plan changes according to their approval sequence. The person with the lowest approval sequence approves first and the person with the highest sequence approves last.

**Tip:** If you add or delete alternate approvers in a table, you need to run the **Refresh Workforce Compensation Data** process afterward. You don't need to run the process if you only change the approval sequence of existing alternate approvers.

### Related Topics

- [Workforce Compensation Plan Hierarchies](#)
- [Options to Configure Workforce Compensation Plan Hierarchies](#)
- [Alternate Approver for Workforce Compensation Plan Changes Is the Final Approver](#)
- [Alternate Approver for Workforce Compensation Plan Changes Precedes the Final Approver](#)
- [Alternate Approver for Workforce Compensation Plan Changes Is in the Middle of the Primary Plan Hierarchy](#)

## Configure Notifications for Workforce Compensation Plan Worksheets

You can configure notification settings that apply across all workforce compensation plans, such as Notify, Disable, or Prompt Manager, using the Configure Global Settings task.

For example, notify managers when their budgets are published or withdrawn and prompt managers when their plan changes are returned for corrections. When at least some or even all of these global settings aren't appropriate for a specific plan, you can override these global settings. Configure plan-specific notification settings, when you configure approvals and notifications for task worksheets in workforce compensation plans.

The Notify action sends the notification immediately. The Prompt manager action lets the manager decide whether or not to send the notification.

*Related Topics*

- [Header and Message Text for All Workforce Compensation Plan Notifications](#)
- [How Workforce Compensation Plan Notifications Work](#)

## Can I configure workflow in workforce compensation to route plan changes for approval?

No. Workforce compensation uses the primary plan hierarchy to route approvals to the highest-level manager. While you can't create your own approval routes, you can create alternate approvers for individual managers using the Configure Approvals and Notifications task.

*Related Topics*



# 45 Worksheets: Examples of Alternate Approver Configurations

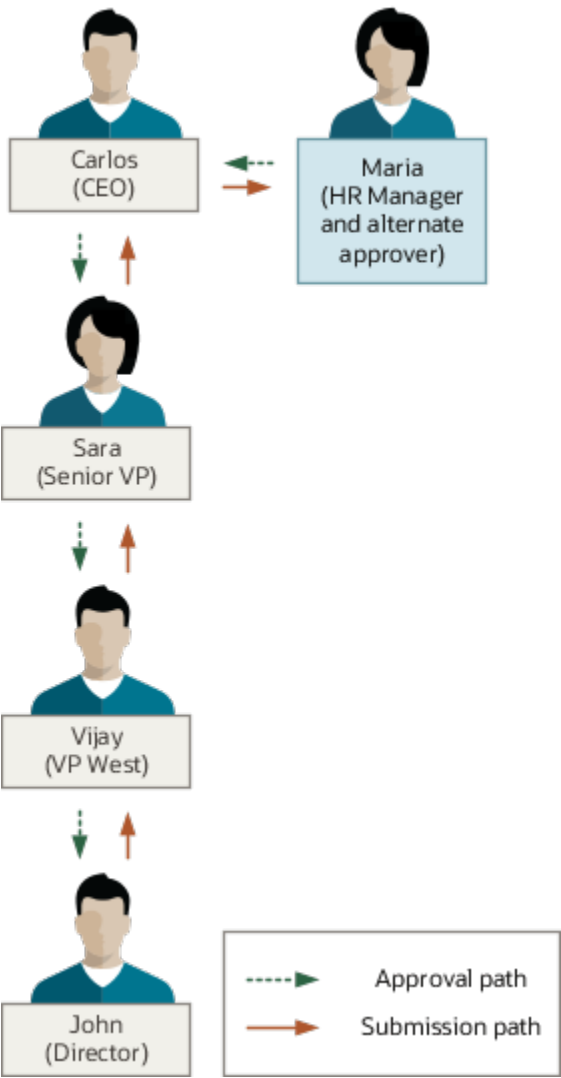
## Alternate Approver for Workforce Compensation Plan Changes Is the Final Approver

Carlos, the CEO, is the top manager in the primary plan hierarchy. Company policy is that his plan changes go to a designated HR manager for final review and approval. Here's how you build the alternate approver table:

Primary Worksheet Manager	Approval Sequence	Alternate Approver
Carlos	1	Maria

And here's an example of how plan change submissions are approved using the primary plan hierarchy and this alternate approver table.

1. John, a director, submits his plan changes to Vijay, VP West, for approval.
2. Vijay reviews and approves John's changes, then makes his own plan changes and submits them to Sara, a senior VP.
3. Sara reviews and approves Vijay's plan changes, then makes her own plan changes and submits them.
4. Carlos, the CEO, reviews and approves Sara's plan changes, then makes his own plan changes and submits them. At this point, the plan status for Carlos is **In Approvals**.
5. Maria, an HR manager, reviews Carlos's plan changes. When she approves the changes, Carlos's plan status becomes fully approved.



## Alternate Approver for Workforce Compensation Plan Changes Precedes the Final Approver

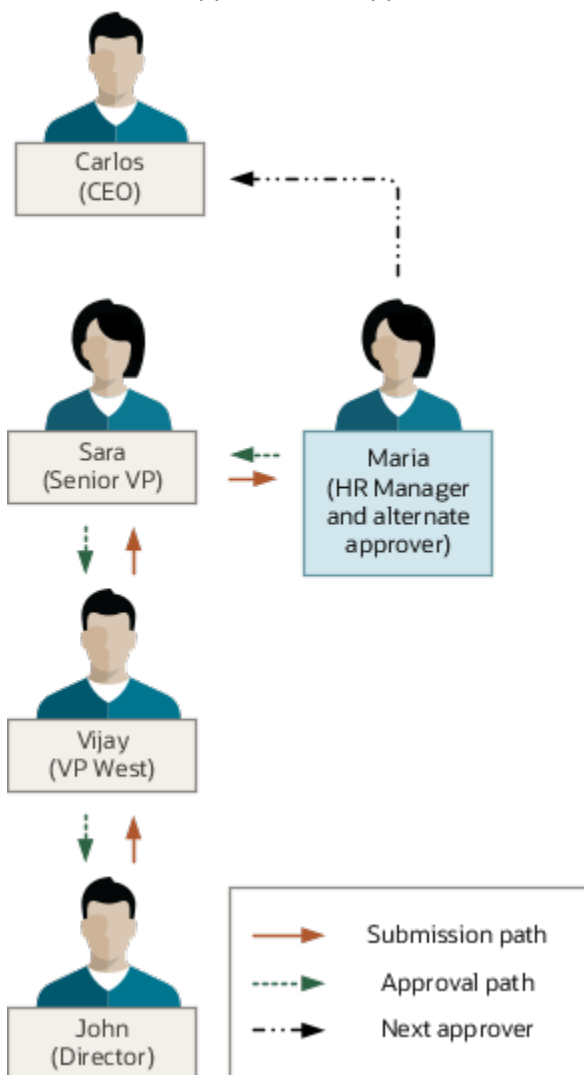
Carlos is the CEO and top manager in the primary plan hierarchy. He doesn't participate in the approval process for workforce compensation changes from his subordinate managers under Sara, a senior VP.

Carlos gets an informational notification when Sara submits her plan changes, but Maria, a manager in HR, has final approval. Here's how you build the alternate approver table:

Primary Worksheet Manager	Approval Sequence	Alternate Approver
Sara	1	Maria

And here's an example of how plan change submissions are approved using the primary plan hierarchy and this alternate approver table.

1. John, a director, submits his plan changes to Vijay, VP West, for approval.
2. Vijay reviews and approves John's changes, then makes his own plan changes and submits them to Sara, a senior VP.
3. Sara reviews and approves Vijay's plan changes, then makes her own plan changes and submits them.
4. Carlos, as Sara's normal approver, gets an informational notification that Sara submitted her plan changes. Maria, an HR manager, is Sara's alternate approver. She gets the approval notification and reviews Sara's plan changes. When Maria approves them, the plan status for Sara and all of her subordinate managers is **In Approval**.
5. When Carlos checks his approvals task worksheet a few days after getting Sara's submission notification, he sees that Maria approved Sara's plan changes. If Sara is eligible, Carlos can change her allocations.
6. After Carlos saves his plan changes, he reviews and approves all of his plan changes and the plan changes that Maria approved. His approval makes the plan fully approved.



## Alternate Approver for Workforce Compensation Plan Changes Is in the Middle of the Primary Plan Hierarchy

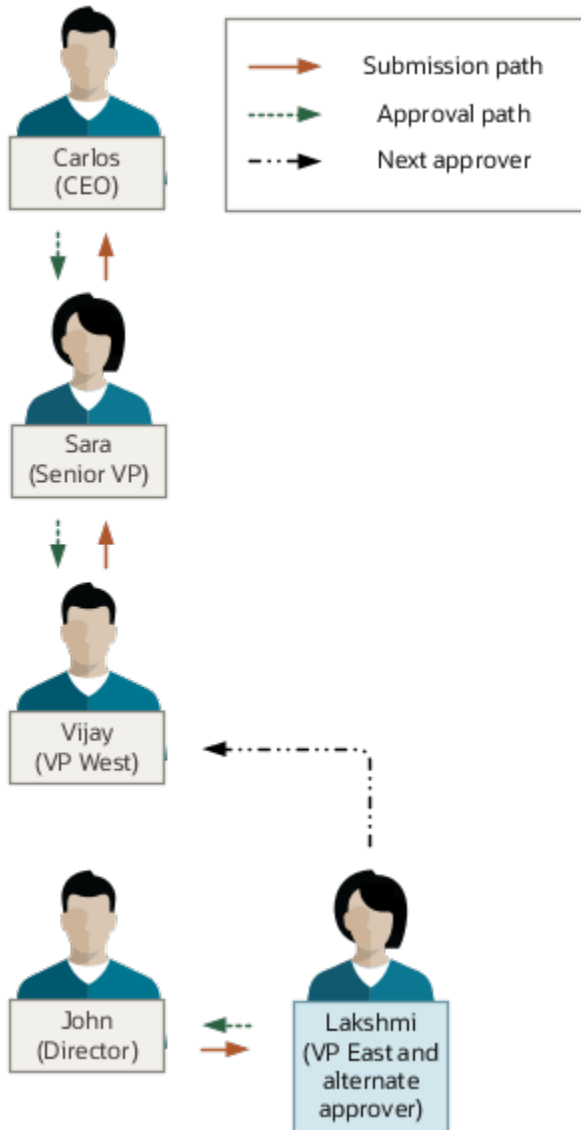
John, a director, reports to Vijay, VP West, according to the primary plan hierarchy. But, John's entire team did a special project for Lakshmi during most of the past year.

Sara, the senior VP whom Vijay reports to, wants Lakshmi to review and approve the compensation for John's team rather than Vijay. Here's how you build the alternate approver table:

Primary Worksheet Manager	Approval Sequence	Alternate Approver
John	1	Lakshmi

And here's an example of how plan change submissions are approved using the primary plan hierarchy and this alternate approver table.

1. John, a director, submits his plan changes.
2. Vijay, as John's normal approver, gets an informational notification that John submitted his plan changes. Lakshmi, VP East and the alternate approver, gets an approval notification that she uses to approve or reject John's plan changes. She can open the Workforce Compensation work area from the notification. At the top of the page, she can select John from the manager list and review his worksheet details for the plan. But, she can't approve or reject John's plan changes in the work area. She approves or rejects John's plan changes using actions in the approval notification.
3. When Vijay checks his approvals task worksheet a few days after getting John's submission notification, he sees that Lakshmi approved John's plan changes. In the detail table, the status for John's changes is **In Approvals**.
4. Vijay can now make and submit his own plan changes to progress the plan through the approval process. Vijay, Sara, and Carlos, the CEO whom Sara reports to, can still make plan changes for John's team even after Lakshmi approves John's changes.





# 46 Worksheets: Compensation Change Statements

## Overview of Compensation Change Statements in Workforce Compensation Plan Worksheets

You can let managers and HR specialists communicate compensation and performance rating changes to people as part of a workforce compensation cycle.

They communicate the changes with compensation change statements using the communications-type task worksheet. They can also use the change statements to communicate promotions done as part of the cycle. The changes that they can communicate, and how they communicate them depends on how you configure compensation change statements.

### *Related Topics*

- [Include Compensation Change Statements in Task Worksheets](#)
- [Overview of Worksheet Display in Workforce Compensation Plans](#)
- [Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets](#)

## Statement Groups, Templates, and Worker Statement Action for Compensation Change Statements

Statement groups are fundamental to compensation change statements. The selected group identifies what templates to use for whom, and what statement action individuals are responsible for. You set up all of these options on the Manage Statement Groups page.

### Name

Use a broad, descriptive name so that people understand what to expect from the statement. For example, your latest compensation and performance statement group might be **2021 Compensation and Performance Changes**. And your latest promotions statement group might be **2021 Promotions**.

### Templates

When you add a template to the statement group, you can set a display name and add criteria for when to use the template. Typically, you add a separate row for each language that you use to communicate changes. Here are some examples for compensation and performance changes:

Template	Display Name	Criteria
Compensation and Performance Change Statement.rtf	English Compensation and Performance Change Statement	Country = US or UK or Canada
Cambios en Compensación y Rendimiento en 2021.rtf	Spanish Compensation and Performance Change Statement	Country = Spain or Mexico or Costa Rica

Here are some examples for promotions:

- If you use the same template for the entire company, you might have something similar to the first row.
- If you have templates in different languages, you might have something similar to the second row.

Template	Display Name	Criteria
Promotion.rtf	Promotion Statement	Country = US or UK or Canada
Promotion.rtf	English Promotion Statement	Country = US or UK or Canada and Proposed Grade Is not blank

To create and load other templates for selection, you can use the Manage Templates page. This page also has sample files to help you create your own templates:

- A list of all the attributes you can include in your own templates.
- Sample compensation change and salary change analytic templates that you can download and tailor for your change communications. Be sure to change the file name before you upload your template.

You can't delete a template that has generated statements associated with it.

## Worker Statement Action

When you want a record that individuals received their change statements, you can set a worker statement action for the template. For example, you want individuals to acknowledge or sign electronically when they received a statement. You can configure worker statement actions to be completed before or after people have reviewed their compensation change statements.

## How You Create a Change Statement Template

You can create the change statement template using attributes or tokens and special syntax to create conditional statements. You need to incrementally test the statement to ensure that there are no errors.

You can add any formatting, logos, text, and data that you want to display in the statement. You need to create the file in the .rtf format. You can't change an existing .doc file to .rtf file type.

To access the predefined template, click Manage Workforce Compensation Plans > Compensation Change Statements > Manage Statement Groups > Manage Templates and downloading the Compensation Change Statement Template.rtf.



## Download Attribute List to Add to Template

Attributes (or tokens) represent worker-specific data displayed in the statement. You can include all columns (excluding iconic columns) that are available to display in the worksheet in a statement template. You add these attributes to your template in the location and formatting you want.

Here's how you can download the list of attributes from the compensation setup pages:

1. Click **Compensation** tile in My Client Groups.
2. Under Workforce Compensation, click **Workforce Compensation Plans**.
3. From the Workforce Compensation Plans page, create a new plan or select an existing plan.
4. Click the **Compensation Change Statements** task.
5. If the Enable Worker Statements field isn't set to Yes, change it to Yes.
6. Click the **Manage Statement Groups** button.
7. In the Manage Statement Groups page, click the **Manage Templates** button.
8. In the Sample Templates region of the window, download the All Attributes List.rtf and save it to your computer.
9. Optionally, you can download the sample Compensation Change Statement Template.rtf to use as a reference.

## How You Can Display Different Currencies In Your Statement Template

Salary columns and component columns (such as Compensation Amount, Eligible Salary, targets, and miscellaneous columns) appear in each worker's local currency. The currencies in which custom numeric columns appear depending on the values determined in those columns.

1. To display salary or component columns in a different currency, you need to create a dynamic calculation on a custom numeric column.
2. Create one or more conditions that multiply the selected column times the currency conversion rates and use the custom column in your statement template.

## Ways to Configure Statement Text

You can format the change statement template to display text exactly how you want.

Text Format	Description	Example
Display Text Always	To include text with no conditions, you can simply copy the variable from the All Attributes Template.rtf for the column you want to display, and paste it into your template.	In this example, you are displaying the worker's first and last name, their worker number, Custom Text Column 1 which, has been configured to display the division, and the primary manager's name. The Worker's name will be in bold in the generated statement.

Text Format	Description	Example
		<p>Name: &lt;?FIRST_NAME?&gt; &lt;?LAST_NAME?&gt;</p> <p>Employee ID: &lt;?WORKER_NUMBER?&gt;</p> <p>Job Title: &lt;?CURRENT_JOB?&gt;</p> <p>Division: &lt;?CUSTOM_COLUMN_1_TEXT?&gt;</p> <p>Manager: &lt;?PRIMARY_MANAGER?&gt;</p>
Display Text Conditionally	You can make a sentence, paragraph, or region of the page display conditionally based on workers meeting certain criteria.	<p>The <b>Award Amount</b>: along with the actual monetary value will only be displayed if the Compensation Amount column for component 1 is not equal to zero. The variable name that represents the worksheet column is the text between the &lt; and &gt;, and syntax before and after create the condition. &lt;?end if?&gt; defines the end of the conditional statement.</p> <pre>&lt;?if: COMP_1_COMPENSATION_AMOUNT!=0?&gt; Award Amount: &lt;?COMP_1_COMPENSATION_AMOUNT?&gt; &lt;?COMP_1_CURRENCY?&gt; &lt;?end if?&gt;</pre> <p>You can display text conditionally if a worksheet column value is not null. In this example, the sentence only appears if the Proposed Job Title field is not null for the worker.</p> <p>Important: The correct syntax is two single quotes, not a single double quote.</p> <pre>&lt;?if: New_Job !=' ' ?&gt;You are being promoted to &lt;?NEW_JOB?&gt; as of January 1, 2012. &lt;?end if?&gt;</pre> <p>You can also display or hide an entire sentence or paragraph. The below paragraph will only appear in the statement if the worker was given a new job, position or grade during the compensation cycle.</p> <pre>&lt;?if:NEW_JOB!=' ' or NEW_POSITION!=' ' or NEW_GRADE!=' '?&gt;We recognize and thank you for your hard work and contribution towards the company's success. As of &lt;?PROMOTION_DATE?, you are being promoted. &lt;?if@inlines:NEW_JOB!=' '?&gt;Your new job title is &lt;?NEW_JOB?&gt;. &lt;?end if?&gt;&lt;?if@inlines:NEW_POSITION!=' '?&gt;Your new position is &lt;?NEW_POSITION?&gt;. &lt;?end if?&gt;&lt;?if@inlines:NEW_GRADE!=' '?&gt;Your new grade is &lt;?NEW_GRADE?&gt;. &lt;?end if?&gt;</pre>

## Statement Generation Timing and Output Format for Compensation Change Statements

You can specify when individuals can get their compensation change statements, according to your organizational policies. For example, anyone can get their statement at any time. Or only people whose changes were posted to HR, or have final approval can get their statements.

You can also specify whether to generate the statements as .pdf or .rtf files.

## How You Generate Statements for Multiple Workers

You can configure the template to allow managers to generate the statement for multiple workers at the same time.

To do so, the template must begin with the following: `<?for-each: PERSONINFO?>`

The template must end with the following: `<?split-by-page-break:?><?end for-each?>`

If the template doesn't include the above 2 statements, managers will only be able to generate the statement for a single selected worker at a time.

## Delivery Options for Compensation Change Statements

You can specify how to generate and deliver worker statements when you configure compensation change statements.

Here are the delivery options that apply for primary plan managers:

- Printed and delivered by managers
- Centrally managed and stored

Administrators using the Administer Workers task can manage change statements for the plan regardless of how they're generated or delivered.

## How Managers Can Print and Deliver Compensation Change Statements

Managers can generate the statements using the Communication task worksheet in the plan.

When configured, the statements are automatically available to managers or administrators, but not individuals. You can let managers generate statements at the same time for specific people, all of their direct reports, or all of their subordinates. When managers generate statements for more than one person using the Selected Workers or the Direct Workers option the application ignores any statement criteria. The managers must select the statement they

want to use for the selected population. When configured, the statements are automatically available to managers or administrators, but not individuals. You can let managers generate statements at the same time for specific people, all of their direct reports, or all of their subordinates. When managers generate statements for more than one person using the **Selected Workers** or the **Direct Workers** option the application ignores any statement criteria. The managers must select the statement they want to use for the selected population.

When managers use the management hierarchy option, they can also generate statements for their people in a specified country. The process generates the statements in a single file for the selected template. If a manager decides to provide individual statements to people and the file contains multiple statements, they need to split the file into separate statements. Then they can provide a copy of each statement to the appropriate individual. Their people can see only the statements that the manager provides to them, as long as they keep the statements.

## How Managers Can Centrally Manage and Store Compensation Change Statements

Managers can generate an individual compensation change statement for each of their people and provide them a copy.

You can also enable people to access the centrally stored statements from their compensation pages unless processing made the statements visible to only administrators and managers. Again, depending on the process configuration, managers can view and print the statements.

Here are the other options you can set if you centrally manage and store statements:

Option	Description
Let managers control when to release the statements to their people	Enable the Allow staggered release of statements option. For example, your policy is to have managers meet with their people to discuss their compensation changes before releasing the statements. If individuals have more than one statement available to them, then their manager has to release each statement separately.
Automatically delete the statements from storage	Set the Days Until Expiration option. For example, your organization has a 90-day retention policy, so you set the expiration to 90. Individuals can save their statements if they want to access them after 90 days. Administrators can override this expiration as appropriate, using the Update Expiration option when they run the Process Workforce Compensation Change Statement process.
Show everyone the same statement name in the plan	Set a global statement name. For example, the template display names identify the template language, such as 2021 Compensation and Performance Changes Spanish or 2021 Compensation and Performance Changes French. Or you want everyone to see the same statement name in the corporate language, for example, 2021 Compensation and Performance Changes.

Compensation administrators configure and run the Process Workforce Compensation Change Statement process to generate and store these changes 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.

## How You Format a Date Variable to Display Dates in a Specific Format

You can format the date variable using the function `<?format-date:DATE_VARIABLE;'YYYY-MM-DD'??>`. You can modify the String 'YYYY-MM-DD' according to your date format requirements. For example:

```
<?format-date:JOB_CHANGE_DATE;'YYYY-MM-DD'??>
```

If value of the variable JOB\_CHANGE\_DATE is Jan 1st 2013, the above expression will display it as “2013-01-01”.

You can also make use of form field options for this purpose.

## How You Format Numeric Separators and Decimal Precision for Numeric Data

You can use the function `<?format-number:NUMERIC_VARIABLE;'9G999D99'??>` where G stands for the position of the comma (,) and D stands for position of the decimal. For example:

```
<?format-number:COMP_1_COMPENSATION_AMOUNT;'9G999D99'??>
```

If the value of the variable COMP\_1\_COMPENSATION\_AMOUNT is 1234.5678, the above expression will display it as “1,234.57” after rounding the numeric data to two decimal places.

Alternatively, you can also make use of form field options.

## How You Find Errors in Statement Template

You can find errors in your template by saving the file to your computer and then open it using Notepad or another text editing application. You can then find the error details and correct your template.

## How You Format the Same Data Differently Based on a Worker's Location

You can use a custom text column to default the location of the worker and display data conditionally or vary data based on value of the custom text column. You can also create multiple statement templates, one for each location. When using multiple templates, managers may have to select the appropriate template to use for each worker based on their location.

## What's the difference between workforce compensation change statements and total compensation statements?

Workforce compensation statements show recent changes to base and variable pay. They apply to a statement group, which has RTF templates that can include criteria to identify which people get the template.

For example, people in Spanish-speaking countries get the Spanish version of the statement. The workforce compensation plan containing the statement configuration determines the statement content. You configure these compensation change statements for a specific plan using the **Workforce Compensation Plans** task in the Compensation work area.

Total compensation statements show base and variable pay, fringe benefits, and perks for a specified period of time, typically a year. These statements are available both online and in PDF format. You configure these statements using the **Total Compensation Statement** tasks in the Compensation work area.

# 47 Worksheets: Worksheet Display Configurations

## Overview of Worksheet Display in Workforce Compensation Plans

You determine the summary and detail information on compensation, performance, promotion, detail table only, approvals, and communication task worksheets when you configure worksheet display.

The specific information managers and HR specialists see depends on the task types and the columns that you enable and configure. Some columns are enabled by default. You can deselect any enabled columns that you don't want to appear in a worksheet.

You also determine the actions available on a worksheet, such as letting managers reassign or delegate individuals or request eligibility changes. And you can provide information that applies to the entire worksheet. For example, you let people know about organizational policies that affect compensation allocations, performance ratings, or promotions, and include links to details.

You can configure up to 10 task worksheets for a plan. For managers to access a workforce compensation plan, you need to configure at least 1 task worksheet. To require approvals for plan changes, you also need to enable and configure an approvals task worksheet.

You enable task worksheets using the Configure Worksheet Display task. You configure the layout of each enabled worksheet using the Configure Task Layout icon on the Configure Worksheet Display page.

## Reference

For descriptions of every worksheet column and action, see *Workforce Compensation Worksheet Configuration Definition* (document ID 1450891.1) on My Oracle Support (support.oracle.com). To help you locate columns and actions, the document tabs organize information in the same groupings as the Configure Worksheet Page Layout pages.

For columns, the document has this information:

- The navigation path for columns that map directly to a field in Oracle Fusion Global HR Cloud Service
- If you can default column values using a plan cross-reference
- If people can update the values in their plan budget and task worksheets

For actions, it tells you about any dependent configurations you need to complete.

### *Related Topics*

- [Performance Considerations for Workforce Compensation Plans](#)
- [Compensation Components in Workforce Compensation Plan Worksheets](#)
- [Overview of Performance Ratings in Workforce Compensation Plan Worksheets](#)
- [Overview of Compensation Change Statements in Workforce Compensation Plan Worksheets](#)

# Configure the Summary Display for Compensation Task Worksheets

You can include key summary information for the compensation component at the top of compensation-type task worksheets. What people see depends on the population that they're viewing in the detail table.

## 1. Enable Compensation Components

Select the configured compensation components that you want to show summary information for. For example, you're configuring separate task worksheets for your **Merit** and **Bonus** compensation components. In the worksheet display for the **Merit** compensation task, you select the **Merit** compensation component as the summary component. For the **Bonus** compensation task, you select the **Bonus** compensation component.

## 2. Enable Summary Views

Enable the views that you want to show, such as the scoreboard, table, analytic, or group view, or a combination of views. When you enable multiple views, you need to make one view the default view that people see whenever they first open the task worksheet.

If you're using worker-level budgeting and setting a budget group, enable the group view. Optionally change the **Group** column display name to reflect the grouping criteria, such as **Location** or **Grade** and **Country**. If you enable the analytic view, you can also enable group view for that summary information.

## 3. Enable the Columns to Show

Enable the columns that you want to show in the summary section. For example, in the scoreboard view, you enable these columns for each enabled compensation component:

- Compensated Workers with %
- Currency or Units
- Eligible Salary
- Allocate with %
- Budget with %
- Remaining Budget with %

For the analytic view, you enable analytics that provide a snapshot of allocations in the current cycle. For example, you enable the **Worker Population**, **Allocation Statistics**, **Allocation Amount**, and **Salary Statistics** analytics.

To show managers and HR specialists the same summary information regardless of any filters they apply to the detail table, enable these three static columns. To show them summary information that changes depending on the filters they apply to the detail table, you can enable three filtered columns.

Static	Filtered
<ul style="list-style-type: none"><li>• Overall Budget</li><li>• Overall Available Budget</li></ul>	<ul style="list-style-type: none"><li>• Budget - Filtered by Team (enabled by default)</li><li>• Available Budget - Filtered by Team</li></ul>



Static	Filtered
<ul style="list-style-type: none"><li>Overall Compensation Amount</li></ul>	<ul style="list-style-type: none"><li>Compensation Amount - Filtered by Team</li></ul>

For example, you enable the **Overall Budget** summary column and leave the **Budget - Filtered by Team** column enabled. A manager changes the **Team** filter on the worksheet to **Direct Reports**. The summary section **Overall Budget** column shows the budget amount for all of the manager's subordinates. The **Budget - Filtered by Team** column shows the budget amount for only their direct reports.

## 4. Optionally Change Display Names and Default Sequences

You can change the display names and default sequences, as appropriate for the audience. For the analytic view, you can change the title. Certain titles also have subtitles that you can change. For example, you want to make your names more human, so you change **Compensated Workers with %** to **Compensated Individuals with %**. And you change **Worker Population** to **Population**.

## 5. Optionally Configure Column Properties

You can configure general and information column properties for the scoreboard, table, and group views. For example, you can set a rounding rule and the decimal place to display. The actual properties vary depending on the column.

All columns include a **Plan Info** property that you can use to communicate useful information to managers. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio. When you include plan info for a column, people viewing the worksheet see a blue icon with an i in it on the column header. They click the icon or hover over it to see the information.

To show column totals in the summary section, you can select **Show totals** for columns that include the property. You probably don't want to show totals in a worksheet that has compensation components with different units of measure enabled. The totals would be meaningless. For example, one component is in monetary units and another is in shares. The **Compensated Workers with %** column total would combine the numeric monetary and shares values.

## 6. Check the Configuration

To see the worksheet summary just the way that the plan audience will see it when the plan becomes active, use the Preview tab. You can easily test different summary configurations to find the summary that best conveys the key information the audience needs and wants to see.

### Related Topics

- [Compensation Components in Workforce Compensation Plan Worksheets](#)

# Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets

You can include key summary information at the top of communication, performance, and promotion type worksheets. What people see depends on the population that they're viewing in the detail table.

## 1. Enable Summary Columns

For all three types of task worksheets, enable the columns that you want to show in the summary section. Here are some examples:

- In the communication-type task worksheet, you enable the **Compensation Amount - Component 1** and **Eligibility Status - Component 1** columns.
- In the performance-type task worksheet, you enable the **Performance Rating**, **Workers with Compensation**, **Actual Percentage**, and **Total Compensation Percentage** columns.
- In the promotions-type task worksheet, you enable the **Promotions**, **Percent Promoted**, **Deviation from Company Target**, and **Filter** columns.

For communication-type worksheets, you can configure the **View or Print** column properties to hide the print icon for ineligible individuals.

For performance-type task worksheets, you can also hide the graph, compensation performance ratings, performance management ratings, all, or a combination in the summary.

For promotion-type task worksheets, you can also enable subtabs that group table information. For example, you enable these subtabs: **By Team**, **By Country**, **By Years in Job**, **By Performance Management Rating**, **By Text Column 1**, and **Organization Averages**.

- You configure the specifics for **By Text Column 1** on the Detail Table tab, under the **User-Defined Columns** group. You can configure the column properties and manage dynamic column conditions and results. The summary subtab aggregates the values from the detail table for all plan management levels.
- If you enable the **Organization Averages** subtab, you can also enable the specific rows that you want that table to show. For example, you enable the **Team One Level Up**, **Team Two Levels Up**, **Department**, and **Enterprise** rows.

## 2. Optionally Change Display Names and Default Sequences

You can change the display names and default sequences of summary columns, as appropriate for the audience. For example, you want to make your names more meaningful. So, you change **Compensation Amount - Component 1** to **Merit Compensation Amount** and **Eligibility Status - Component 1** to **Merit Eligibility Status**.

## 3. Optionally Configure Plan Info

You can configure the **Plan Info** property for summary columns in the communication and performance type worksheets. Use the property to communicate useful information to managers. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio. When you include plan info for a column, people viewing the worksheet see a blue icon with an i in it on the column header. They click the icon or hover over it to see the information.

The promotion summary doesn't have any column properties for you to configure.

## 4. Configure Summary Display Options for Promotion Worksheets

You can also configure display options for promotion summaries. For example, you enter **Company Target - Average Percent Promoted** and **Minimum Team Size to See Company Target** values. And you set the default display order and graph bar color.

## 5. Check the Configuration

To see the worksheet summary just the way that the plan audience will see it when the plan becomes active, use the Preview tab. You can easily test different summary configurations to find the summary that best conveys the key information the audience needs and wants to see.

### *Related Topics*

- [Overview of Performance Ratings in Workforce Compensation Plan Worksheets](#)
- [Overview of Compensation Change Statements in Workforce Compensation Plan Worksheets](#)

## Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets

You can enable columns from the personal, alerts, employment, salary, component, promotion, and performance groups to appear in the main table of task worksheets. You can also configure your own, user-defined text, numeric, and list columns.

You can enable additional information columns, such as notes, attachments, and histories. You do all of this when you configure the worksheet display. The compensation, detail table only, performance, and promotion task worksheets all have a detail table. The communication and approvals worksheets don't.

## Display Names and Column Sequences

You can provide meaningful column names for the plan audience by changing the default display names. For example, you change **Eligible Salary - Component 1** to **Eligible Salary for Merit Increase**. And you can change the default sequence of any column, as appropriate. Use the **Refresh** icon on the Column Preview panel to see how the reordered columns will appear in the table.

## Column Properties

You can configure general, visibility and access, default value, and salary and element mapping properties for the columns you enable. The available sections and properties vary depending on the column.

All columns include a **Plan Info** property that you can use to communicate useful information to managers. For example, you share the expression used to calculate the column values, or add a definition for the column, such as explaining what is compa-ratio. When you include plan info for a column, people viewing the worksheet see a blue icon with an i in it on the column header. They click the icon or hover over it to see the information.

## Preview Tab

To quickly check your page layout configuration for the compensation, detail only, performance, and promotion task worksheets at any time, use the Preview tab. The preview shows the entire worksheet, including the enabled summary information, detail table columns, actions, and column-level and plan-level information.

The approvals and communication task worksheets don't have the Preview tab.

### Related Topics

- [Compensation Component Number and Name, and Detail Table of Worksheet Display](#)
- [Overview of Performance Ratings in Workforce Compensation Plan Worksheets](#)

## Approval Subtabs, Columns, and Worker Details Columns Configuration for Approvals Task Worksheets

Only managers with at least one subordinate manager have the approvals task worksheet in their workforce compensation plan. Managers use the approvals worksheet to view the status of their subordinate managers' plan changes, approve or reject submitted changes, or request additional information.

Here's how you configure the display for approvals task worksheets. For all three steps, you can optionally change the display and default sequence.

1. Enable the worksheet tabs that managers see, such as approvals, compensation overview, salary range analysis, and alerts.
2. Enable the columns that appear on each tab.
3. Enable the columns that appear on the Worker Details dialog box. Managers open the dialog box when they click a link in a column that contains the number of workers or a percentage.

The column group names and the approval tab names that you see on the Configure Worksheet Page Layout page need to match. This way you know which tab you're configuring columns and worker details columns for.

### Example

On the Approvals Subtabs tab, you enable the Compensation Overview tab. On the Columns tab, in the Compensation Overview column group, you enable these columns:

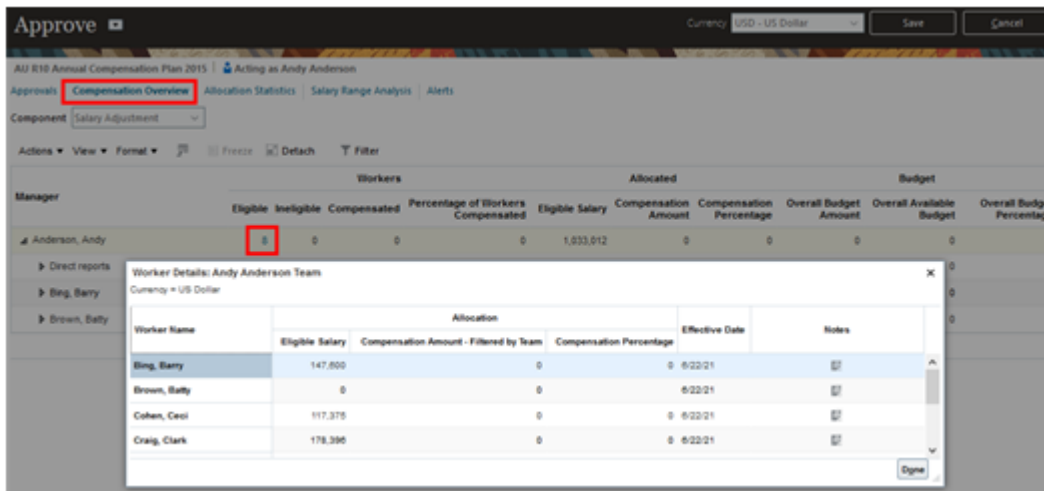
Workers	Allocated	Budget
<ul style="list-style-type: none"> <li>• Eligible</li> <li>• Ineligible</li> <li>• Compensated</li> <li>• Percentage of Workers Compensated</li> </ul>	<ul style="list-style-type: none"> <li>• Eligible Salary</li> <li>• Compensation Amount</li> <li>• Compensation Percentage</li> </ul>	<ul style="list-style-type: none"> <li>• Overall Budget Amount</li> <li>• Overall Available Budget</li> <li>• Overall Budget Percentage</li> </ul>

On the Worker Details Columns tab, in the Compensation Overview column group, you enable these columns:

- Allocation columns: Eligible Salary, Compensation Amount - Filtered by Team, and Compensation Percentage
- Effective Date
- Notes

On the Actions tab you can configure the task actions such as Request for Information, Change Access for Managers, and Export to Workbook. You can also have the Approval chain appear at the top of the page to let managers see where their plan changes are in the cycle.

When Andy Anderson opens his approvals task worksheet and clicks the Compensation Overview tab, he sees the columns that you enabled in the table. When Andy clicks the link for his 8 eligible workers, he opens the Worker Details: Andy Anderson Team dialog box with the worker details columns you enabled.



## Approval Subtabs

Here are descriptions for the approval subtabs on the setup page and on the approvals workeet.

Subtab	Description
Approvals	You show a hierarchy of all subordinate managers and the status of their plan changes. We recommend that you leave this subtab enabled.
Compensation Overview	You can show how many people were awarded compensation during the cycle, the total amount allocated, and the total available budget.
Allocation Statistics	You can enable up to five buttons. The buttons show the average allocation and allocation spread. They also show allocations by overall performance rating, by country, and by compensation performance rating.
Salary Analysis	You can enable up to six buttons. The buttons show the compa-ratio, quartile, quintile, and salary range analysis. They also show the total salary cost and average salary.
Target Analysis	You can enable up to three buttons that show the target overview, target versus actual, and deviation from target.
Performance	You can enable up to eight buttons. The performance management buttons show the overall rating, overall competency rating, overall goal rating, and overall development goal rating. The other buttons show compensation performance rating, calculated rating, worker potential, and risk of loss.
Promotions	You show the number of people whose job, grade, or position changed during the compensation cycle.
Alerts	You show all of the currently enabled alerts and the alert counts. You can also let managers view the affected individuals.

### Related Topics

- [Configure Approvals for Workforce Compensation Plan Worksheets](#)

# Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets

These actions enable managers to set their own defaults using the Personalize Layout tool on their worksheets. You enable the actions as part of the Configure Worksheet Display task. You set the initial default values using the Configure Default Worksheet Display task.

You set the initial default values using the Configure Default Worksheet Display task. The specific actions that you can enable depend on what type of task the worksheet is for. For example, in compensation worksheets, you can enable the Actions, View, and Format menus and corresponding options that show on the detail table. Communication worksheets don't have the Actions menu or corresponding options.

For these actions, you also need to enable a corresponding column in the Detail Table tab:

Enabled Action	Detail table Column to Also Enable
Any rank workers actions in the <b>Actions &gt; Rank Workers</b> group.  <b>Tip:</b> To let managers see full ranking details, also enable <b>View Ranking Details</b> in the <b>Right Click Menu</b> group.	<b>Ranking</b> in the <b>Performance</b> group
<b>View Compensation History</b> in the <b>Right Click Menu</b> group.	<b>Compensation History</b> in the <b>Additional Information</b> group
<b>Manage Notes</b> in the <b>Right Click Menu</b> group.	<b>Notes</b> in the <b>Additional Information</b> group
Any <b>Apply Targets</b> actions in the <b>Apply Targets</b> group and <b>Apply Targets</b> in the <b>Right Click Menu</b> group	At least one target column in an enabled component group, such as <b>Target Compensation Amount - Component 1</b>

## Hide Ineligible Workers Action

This action applies to people with an Ineligible status after the **Start Workforce Compensation Cycle** and **Refresh Workforce Compensation Data** processes evaluate the plan-level eligibility profiles. The action ignores anyone with an **Ineligible** status according to eligibility profiles added to the compensation components.

## Model Actions

You can add the models task worksheet to the plan using the **Configure Models** task. And managers can use that task worksheet for all of their modeling. You can also enable the **Model** actions for a worksheet to let managers create and apply models while they're in that worksheet. You don't need to enable model actions to include the model worksheet. But if you enable any model actions, you also need to configure modeling.

## Preview Tab

To quickly check your page layout configuration for the compensation, detail only, performance, and promotion task worksheets at any time, use the Preview tab. The preview shows the entire worksheet, including the enabled summary information, detail table columns, actions, and column-level and plan-level information.

The approvals and communication task worksheets don't have the Preview tab.

### *Related Topics*

- [Compensation and Promotion Worksheet Actions](#)
- [Performance Worksheet Actions](#)
- [Communication Worksheet Actions](#)
- [How the Ranking Score Is Calculated](#)

## Information Configuration in All Task Worksheet Displays

You can provide managers with important information in the page header of any task worksheet when you configure the worksheet display.

For example, you can explain policies that apply to merit increases, performance evaluations, or promotions for the upcoming focal compensation cycle. You can also include links to details.





# 48 Worksheets: Column Properties

## General Properties of Worksheet Columns

You control the column appearance, position, and data storage using the options available in the General section of the Configure Column Properties page. The available properties depend on the type of column you're configuring and the selections you make on the page.

Here's a comprehensive list of the General section properties:

Field	Description
Column	Read-only field that identifies the column you're configuring the properties for.
Column Width in Pixels	Set the specific width, anywhere from 50 to 200 pixels.
Data Type	Read-only field that identifies whether the column values are numbers or characters.
Decimal Place to Display	Identify the number of places to show to the right of the decimal.
Default Sequence	Default position of the column in relation to the other columns in the summary area, detail table, or dialog box that you're configuring.
Display Name	Identify the column with a name that's meaningful to the people working with the workforce compensation plan.
Enable large amount of text	For user-defined text columns 12 -- 15, let managers enter up to 4,000 characters in the column.
Include 0 allocations in summary totals	Include the 0 allocations in the summary counts when you start Workforce Compensation plan cycle.
Include in audit trail	Include changes made to this column in the audit trail.
Monetary	Show the monetary values in the currency selected on the worksheet. The worksheet currency could be the corporate currency, the manager's preferred currency, or the individual's local currency. When the manager switches the currency, the worksheet converts the monetary values from the previous currency to the current currency using the specified conversion rate.
Option to Display in Worksheet	For the country column, specify how the country information is displayed. Choices are country code, country name, and country code and name.
Rounding Rule	Specify whether to round numbers up or down and to what decimal place, such as <b>Round down to .01</b> . Or, you can use currency rounding and make sure to populate <b>Configure Currency Properties</b> using the <b>Configure Plan Currency</b> task.
Show numeric separators	Show separators for numbers, such as commas and periods.
Show totals	Include the total for all components in the summary section of the compensation worksheet. Available for only numeric compensation component columns on the Summary tab.
Value Remains Unchanged	Keep the percentages stored in these columns, even when the corresponding amount changes: <ul style="list-style-type: none"><li>• Compensation Percentage of Eligible Salary</li><li>• Compensation Percentage of Maximum</li><li>• Compensation Percentage of Minimum</li></ul>

Field	Description
	<ul style="list-style-type: none"><li>• Target Percentage</li><li>• Target Percentage Maximum</li><li>• Target Percentage Minimum</li><li>• Worker Budget Percentage</li><li>• Percentage of Budget Pool</li></ul>
Wrap text	Adjust row height rather than column width to show all of the value.

#### Related Topics

- [Overview of Worksheet Display in Workforce Compensation Plans](#)

## Visibility and Access Properties of Worksheet Columns

You control the visibility of and access to the column using options on the Configure Column Properties page. The type of column you're configuring determines whether this section is available.

### Main Column Settings

Determine whether to include the column in the worksheet and if people can only view data or can also update it using main column settings. If you enable the column, you can also specify whether it should not appear until the manager opts to show it. If you initially hide the column, you need to enable **View** on the Actions tab so that managers can show it. You can also control general column access. If you set role-based overrides, the main column access setting applies to all roles not identified as part of the override.

### Role-Based Overrides

You can refine column visibility and access by roles. You select the main column setting you want to override. Next you specify whether the override applies to either the people who have the added roles or who have none of them. And then you add the applicable roles. Any role-based overrides take precedent over the main column visibility and access settings.

We recommend that you configure the main column setting to apply to the majority of roles. Then, configure the override settings for the least affected roles.

### Example Configurations

You want everyone but line managers to see the current compa-ratio column.

1. Enable the **Salary Range Compa-Ratio - Current** column.
2. In the column properties Visibility and Access section, set **Override Setting** to **Not Enabled**.
3. Set **Condition** to **User has any of these roles**.
4. Add the **Line Manager** role.

You want everyone to see the **Individual Performance Multiplier** user-defined column but only compensation managers to update values.

1. Enable a user-defined numeric column and name it **Individual Performance Multiplier**.
2. In the column properties Visibility and Access section, set **Override Setting** to **Updatable**.
3. Set **Condition** to **User has any of these roles**.
4. Add the **Compensation Manager** role.

You want everyone to see and update the **Individual Performance Multiplier** user-defined column. You don't want alternate approvers who aren't compensation or line managers to view or update it.

1. Enable a user-defined numeric column and name it **Individual Performance Multiplier**.
2. In the column properties Visibility and Access section, set **Override Setting** to **Not enabled**.
3. Set **Condition** to **User has none of these roles**. Add the **Line Manager** and **Compensation Manager** roles.

#### Related Topics

- [Overview of Worksheet Display in Workforce Compensation Plans](#)
- [Performance Considerations for Workforce Compensation Plans](#)

## Default Value Properties of Worksheet Columns

You can set default values for the column by selecting from the options available in the Default Values section of the Configure Column Properties page. The values populate the worksheet column when you run the Start Workforce Compensation Cycle process.

Here are properties that you can select from to set default values. Unless otherwise specified, after you set a property, the other properties disappear except Default value subject to refresh. You can see all properties again by clearing the current setting.

Property	Description
Default Value	Enter a specific number of series of characters that appears by default in the column.
Default and Override Formula	<p>Replace any existing values, including blank, with default values returned by the specified <b>Compensation Default and Override</b> formula. For example, use a formula to get stored scores, rating, incentive plan amounts, target percentages, and special earning calculator values. Then use the formula results to set default values for the column.</p> <p>To verify that the selected formula returns the expected results, run a test using a sample person record. Run the test by clicking the <b>Test Condition and Column Results</b> icon next to the formula.</p> <ul style="list-style-type: none"><li>• If you get an incorrect formula, use the <b>Fast Formulas</b> task to correct your formula.</li><li>• If you don't see an expected salary, make sure that the person's salary record exists as of the HR data extract date.</li><li>• If a person unexpectedly has an <b>Ineligible</b> status, check the eligibility profile for their assignment.</li></ul>
Compensation Derived Factor	Set default column values using a compensation derived factor. You create derived factors for compensation using the <b>Derived Factors</b> task in the Compensation work area.
Cross Reference Plan	Select the workforce compensation plan with the data you want to use as default values in this column. It can be the same plan.

Property	Description
	After you select the plan, you need to specify which cycle and column to extract the default values from.
External Data Record Type	<p>Specify whether the external data you're showing in the column is from a legacy application or third party.</p> <p>After you select the record type, you need to select the external data column to get the default values from, for example, Column 16.</p>

## Reference

For descriptions of every worksheet column, see *Workforce Compensation Worksheet Configuration Definition* (document ID 1450891.1) on My Oracle Support ([support.oracle.com](https://support.oracle.com)). You can also see this information:

- The navigation path for columns that map directly to a field in Oracle Fusion Global HR Cloud Service
- If you can default column values using a plan cross-reference
- If people can update the values in their plan budget and task worksheets.

### *Related Topics*

- [Miscellaneous Rate Component Columns and User-Defined Columns](#)
- [Overview of Worksheet Display in Workforce Compensation Plans](#)
- [When to Use a Fast Formula or Dynamic Column to Display Information in a Worksheet Column](#)
- [Formula Type Is Compensation Default and Override](#)

## Cross-Reference Column Properties

You can use values from another column as default values for a column as long as neither column is a percentage column.

That other column can be in the same worksheet, a different worksheet in the same plan, or a worksheet in a different plan. For example, you want your managers to see all compensation for the workforce compensation cycle when they're planning salary and bonus changes. Because they use separate plans to make these changes, you cross-reference the relevant amounts from the other plan.

- In the salary plan worksheet, you enable a column, such as a miscellaneous rate or user-defined column, to show the bonus amounts as default values.
- In the bonus plan worksheet, you enable a similar column to show the salary amounts as default values.

Or maybe you want to generate a single compensation change statement that shows the compensation changes from the multiple plans managers use in the cycle. You create a plan that has only a communication task worksheet. Then you enable and configure the columns, as shown here.

Compensation Change Statement Column	Cross-Reference
Compensation Amount - Component 1	Merit plan, Compensation Amount - Component 1 column
Compensation Amount - Component 2	Bonus plan, Compensation Amount - Component 1 column
Compensation Amount - Component 3	Stock plan, Compensation Amount - Component 1 column

The worksheet with the cross-references shows the latest referenced data as soon as people save their changes to that data.

## Cross-Reference Plan

You can cross-reference a column from any active plan, even plans with no started cycles. You can even cross-reference the same column in the same plan worksheet to use values from a previous workforce compensation cycle. For example, you want managers to consider target amounts or bonuses from the previous cycle when they make their plan changes in the current cycle.

Managers can't see the default values for plans with no started cycles. You need to run the **Start Workforce Compensation Cycle** process for the relevant plans and then they can see the default values.

## Cycle Matching

Here's how you can specify which started workforce compensation cycle to get the referenced values from. The plan cycle name and extract dates come from the plan cycles configurations of the plan with this worksheet and the cross-referenced plan.

Value	Description
Same Cycle Extract Date	Get the reference data from the plan cycle with the same HR data extraction date as this plan's cycle.
Same Cycle Display Name	Get the reference data from the plan cycle with the same name as this plan's cycle.
Previous Cycle Extract Date	Get the reference data from the plan cycle with the HR data extraction date that's closest to, but still before this plan cycle's extract date.
Latest Cycle Extract Date	Get the reference data from the most recent plan cycle, without regard to this plan cycle's extract date. Typically, you use this value in a plan that's always available and automatically clears after the new cycle runs.

## Reference

For descriptions of every worksheet column, see *Workforce Compensation Worksheet Configuration Definition* (document ID 1450891.1) on My Oracle Support ([support.oracle.com](https://support.oracle.com)). You can also see this information:

- The navigation path for columns that map directly to a field in Oracle Fusion Global HR Cloud Service
- If you can default column values using a plan cross-reference
- If people can update the values in their plan budget and task worksheets.

*Related Topics*

- [Default Value Properties of Worksheet Columns](#)
- [Overview of Worksheet Display in Workforce Compensation Plans](#)

## Formula Type Is Compensation Default and Override

To determine the default values for a worksheet column in a workforce compensation plan, you can create formulas using the Compensation Default and Override formula type.

Here's a comprehensive list of the contexts available to this type of formula:

- 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

The database items available for this type of formula are related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates.

These are the input variables available to this type of formula:

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

Input Value	Data Type	Required	Description
CMP_IV_PERSON_ID	Number	Y	Unique numeric identifier for the individual associated with the workforce compensation plan
CMP_IV_PLAN_START_DATE	Date	Y	Date when the workforce compensation plan becomes active
CMP_IV_PLAN_END_DATE	Date	Y	Date when the workforce compensation plan becomes inactive
CMP_IV_PLAN_ELIG_DATE	Date	Y	Date when 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 when the <b>Start Workforce Compensation Cycle</b> and <b>Refresh Workforce Compensation Data</b> processes obtain conversion rates from the general ledger daily rates table.
CMP_IV_ASSIGNMENT_ID	Number	Y	Date to use for assignments

These are the return variables available to this type of formula:

Return Value	Data Type	Required	Description
L_DEFAULT_VALUE	Number/Char/Date	Y	Default value from the formula. The date should be in yyyy/mm/dd format
L_DATA_TYPE	Char	Y	Data type of the column

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

```

/*****
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 =====*/
```

#### Related Topics

- [Default Value Properties of Worksheet Columns](#)
- [Formula Compilation Errors](#)
- [Formula Execution Errors](#)
- [When do I run the Compile Formula process?](#)
- [Example of Writing a Fast Formula Using Formula Text](#)

## Sample Compensation Default and Override Formulas

You can test setting default values for worksheet columns in a workforce compensation plan using these sample formulas of type Compensation Default and Override. You can also use these sample formulas to create your own versions.

### CMP\_ELIGIBLE\_SALARY\_PRORATION\_DAILY\_AVERAGE

Calculates the eligible salary by averaging the daily salary. The formula accounts for number of days that a salary is in effect during the evaluation period of the workforce compensation cycle.

### CMP\_ELIGIBLE\_SALARY\_PRORATION\_MONTH\_END\_AVERAGE

Calculates the eligible salary by averaging the salary on the last day of each month in the evaluation period of the workforce compensation cycle. The calculation uses the salary on the last day of the evaluation period for midmonth evaluation end dates.

### CMP\_ELIGIBLE\_SALARY\_PRORATION\_DAILY\_AVERAGE\_NINETY\_DAY\_MIN

Calculates the eligible salary by averaging the daily salary. The formula accounts for the number of days that a salary is in effect during the evaluation period of the workforce compensation cycle. It returns 0 for people who worked fewer than 90 days.

### CMP\_ELIGIBLE\_SALARY\_PRORATION\_DAILY\_AVERAGE\_USING\_FTE

Calculates the eligible salary by averaging the daily salary adjusted for part-timers. The formula accounts for the number days that a salary is in effect and FTE during the evaluation period of the workforce compensation cycle.



## CMP\_ELIGIBLE\_SALARY\_PRORATION\_DAILY\_AVERAGE\_FOR\_JOBS

Calculates the eligible salary by averaging the salary for the number of days the person holds a specific job code on the assignment. The formula accounts for the number of days that a salary is in effect during the evaluation period of the workforce compensation cycle.

### *Related Topics*

- [General Properties of Worksheet Columns](#)
- [Formula Type Is Compensation Default and Override](#)

## Salary and Element Mapping Properties of Compensation Amount Columns

You can specify whether approved compensation amount changes for the component transfer to HR as single payments or as adjustments to people's salary amounts. Use the options in the Element Mapping section of the Configure Column Properties page.

### Single Payment

To pay the changes as a single payment, set **Post as Salary** to **No**. Then add the payroll elements to use to pay the specified compensation amount. You can add multiple payroll elements to accommodate payments in different currencies and to pay people in different legislative data groups.

### Base Pay Adjustment

To adjust base pay by the specified compensation amount, set **Post as Salary** to **Yes**. When the **Transfer Workforce Compensation Data to HR** process runs, it updates each person's salary with the amount stored in the compensation amount column of the component. You can also post any itemized adjustments for future reference.

### *Related Topics*

- [Compensation Components in Workforce Compensation Plan Worksheets](#)
- [Compensation Component Number and Name, and Detail Table of Worksheet Display](#)
- [How You Enable Salary Itemization Using Incremental Components](#)
- [Incremental Salary Component Lookups](#)

## Post Incremental Itemized Salary Adjustments in a Workforce Compensation Plan to HR

To post the component amount change as an itemized adjustment, you select the applicable incremental salary component. The **Transfer Workforce Compensation Data to HR** process then updates each person's salary. It also adds the incremental salary component and that component adjustment amount to the salary for future reference.

To post the compensation amounts of all enabled incremental components as a single adjustment to each person's salary, leave these fields blank:

- Salary Component
- Salary Includes Simple Components

## Example Configuration

Your workforce compensation plan has a compensation task worksheet with the **Merit** and **COLA** compensation components enabled. A manager uses the worksheet to give someone a \$5,000 merit increase and a \$1,500 cost of living increase. Here's how you configure the column properties so both component amounts increase the person's salary amount by \$6,500. The adjustments also transfer for future reference.

- For both components, set **Post as Salary** to **Yes**.
- For the **Compensation Amount - Merit** component, set **Salary Component** to **Merit**.
- For the **Compensation Amount - COLA** component, set **Salary Component** to **Cost of living**.

### Related Topics

- [Considerations for Using Salary Bases with Incremental Components versus Simple Components](#)
- [Salary Amount Is Determined by Incremental Components](#)
- [How You Enable Salary Itemization Using Incremental Components](#)
- [Compensation Components in Workforce Compensation Plan Worksheets](#)
- [Compensation Component Number and Name, and Detail Table of Worksheet Display](#)

# Post Salary Compensation Amounts to Simple Components in a Workforce Compensation Plan to HR

You can distribute and post salary compensation amounts back to people whose salaries include simple components through the transfer process.

You navigate to the properties for the compensation amount worksheet column you use for your salary increases and scroll down to the Salary and Element Mapping section.

1. Select the **Yes** option for Post as Salary.
2. Select the **Yes, manager does not enter simple components** option for Salary Includes Simple Components. You may also have Salary Includes Rates enabled.

If you choose the **Yes, manager enters simple components** option, you need to configure the section on the Individual Worker Display page instead.

Only those salary bases that use simple components appear in the search. After you select a salary basis, the associated simple components appear. The derived components that contribute to the overall salary are also listed in the table, but they don't have any distribution setup support.

*Related Topics*

- [Considerations for Using Salary Bases with Incremental Components versus Simple Components](#)
- [Salary Amount Is Determined by Simple Components](#)
- [Compensation Components in Workforce Compensation Plan Worksheets](#)
- [Compensation Component Number and Name, and Detail Table of Worksheet Display](#)

## Rate Application Result Options for Salary Adjustments to Simple Components

When you run the Transfer Workforce Compensation Data to HR process you select one of the rate application result options.

Here are the 4 rate application result options:

***Rate Application Result Options***

Option	Results
Amounts	Rate receives a change amount as entered here (which can be an increment or decrement amount to previous rate value).
Percentages	Rate receives a change amount as a percentage of the base salary change amount (increment/decrement in base salary).
Percentage of Remaining	The application first allocates the rates that use Amount or Percentage type of result and arrives at the remaining increment in base salary. Then it applies the specified percentage on this remaining increment amount to arrive at the change amount for the rate.
Balances	Rate receives the balance increment remaining after calculating other rates.

*Related Topics*

- [Considerations for Using Salary Bases with Incremental Components versus Simple Components](#)
- [Salary Amount Is Determined by Simple Components](#)
- [Compensation Components in Workforce Compensation Plan Worksheets](#)
- [Compensation Component Number and Name, and Detail Table of Worksheet Display](#)

## Considerations for Posting Salary Adjustments to Simple Components

You need to consider these points when you post salary adjustments to simple components.

Consider the following:

- The Balance rate application result method is required for each salary basis you configure.
- The simple component distribution condition builder uses worksheet columns only.
- Derived components get calculated as usual during transfer process. All other rate types allow for distribution setup.
- The Transfer process doesn't post the salary if the overall salary after distribution doesn't match the salary proposed in the worksheet.
- The **Overall Salary**, **Fixed Amount** and **Fixed Percentage** simple components won't have any distribution setup, so you can't edit the **Rate Application Results** and **Value** fields for those simple components.
- You can edit the rate application results for the simple components of **User enters amount** and **User enters percentage** types.
- Simple components of type **Progression Grade Ladder Rate** aren't supported.

#### *Related Topics*

- [Considerations for Using Salary Bases with Incremental Components versus Simple Components](#)
- [Salary Amount Is Determined by Simple Components](#)
- [Compensation Components in Workforce Compensation Plan Worksheets](#)
- [Compensation Component Number and Name, and Detail Table of Worksheet Display](#)

## How to Post Back Salary Changes for People Whose FTE is Less Than 1

When workers have an FTE that is less than 1 you can let managers edit the Base Salary Change Amount and Base Salary Percentage Change columns in the worksheet.

When you configure the columns in setup and your plan has a single salary component, you need to deselect the **Read-Only** check box to let managers edit the column in the worksheet because the value is selected by default. Managers enter the salary change amount and the worksheet uses that amount to reverse calculate the compensation amount in the plan frequency.

## Rounding Rule Behavior When You Post Back Salary Changes for People Whose FTE is Less Than 1

You configure the rounding rules when you set up the salary information columns. The application applies rounding rules when managers edit the columns in the worksheet.

Here's how the application rounds the amounts:

- Base Salary – You can configure rounding rules in setup for Base Salary - New, Base Salary Change Amount, and Base Salary Percentage Change columns.

- If all three of the columns have rounding rules, only the rounding rule on Base Salary - New column is honored and the other rounding rules are ignored.
- If there's no rounding rule configured for Base Salary - New, and both Base Salary Change Amount and Base Salary Percentage Change columns have rounding rules configured, preference is given to Base Salary Change Amount. Rounding rule configuration on Base Salary Percentage Change is ignored.
- If there is no rounding rule on either Base Salary - New or Base Salary Change Amount, a rounding rule on Base Salary Percentage Change is honored.
- Here's the order of preference for rounding rules. It depends on which column you've configured a rounding rule:
  - a. Base Salary - New
  - b. Base Salary Change Amount
  - c. Base Salary Percentage Change

## Rounding Rule Behavior for Base Salary – Current Column

You can configure a rounding rule when you set up the Base Salary - Current column. The rule applies when managers edit the column in the worksheet.

The salary data of the assignment without rounding applies for this column by default. If the data comes from a column default, like a fast formula, then the rounding rule you configure for the column during setup applies.



# 49 Worksheets: Dynamic Columns in Worksheet Display Configurations

## Overview of Dynamic Columns in Workforce Compensation Plan Worksheets

You can calculate and display values that vary by individual for many worksheet columns, including most percentage columns. You do this by building conditional expressions for the appropriate columns. For example, you want to base the bonus eligible salary on the current annual salary.

You can also determine the values in one column using values in another column. For example, as part of the annual bonus review, you want to show managers the bonus target amounts to consider during allocations. You build a dynamic calculation that varies the **Bonus Target Amount** by each individual's performance rating. For example, people with an **Outstanding** performance rating have a bonus target amount that's 10% of their bonus eligible salary. People with a **Meets** rating have an amount that's 5%.

### Validation and Testing

You can validate each condition as you build it and test all conditions and column results on the Dynamic Calculation page. You can also export the conditions on the page to review and validate them outside of the worksheet configuration.

### Column Information Sourced Outside the Plan

When the information source for a column is outside the workforce compensation plan, you might need to run the **Refresh Workforce Compensation Data** process. 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.

## Evaluation Order, Sequence, and the Default Condition of Dynamic Worksheet Columns

The evaluation order of dynamic columns identifies the calculation order when the condition of one column uses the results of another column.

For example, you build the dynamic column condition of the **Target Compensation Amount Minimum** component column to use eligible salary. You set the evaluation order to **1** for the dynamic column of the **Eligible Salary** component column. And you set the evaluation order to **2** for the corresponding **Target Compensation Amount Minimum** component column. This way the dynamic column for target compensation uses the appropriate eligible salary in its conditions.

## Sequence and Default Condition

The sequence identifies the calculation order for conditions on the same Dynamic Column page. The worksheet evaluates every condition for the column in sequence order. The default condition is the condition to use when no other conditions are met, so it has to always be the highest sequence. For example, condition 1 gives people with a performance rating of 5 a 10% bonus. For people who don't have a 5, condition 2 checks to see if they have a 4. If they do, they get a 5% bonus. Condition 3, the default condition, says that everyone else doesn't get a bonus. If you don't select a default condition and no conditions are met, the column displays no values.

Configure conditions that cover the most workers with the highest sequence numbers to improve worksheet and batch process performance. Test a few dynamic calculations at a time to assess the performance impact and decide what level of impact the plan audience can accept.

### Related Topics

- [Configure the Compensation Amount Dynamic Column of the Bonus Component to Reward High Performers](#)

## Triggering Events for Conditions of Dynamic Columns and Alerts

You specify when to evaluate the conditions of dynamic columns and alerts by selecting one or more of these triggering events:

Triggering Event	Description	Dynamic Column Example	Alerts Example
Start compensation cycle	When the <b>Start Workforce Compensation Cycle</b> process runs, it calculates the results for all dynamic column and alert conditions.	Calculate the eligible salaries that managers use during the cycle.	Let the worksheet managers know that an individual got a recent pay increase and isn't eligible.
Refresh data	When the <b>Refresh Workforce Compensation Data</b> process runs, it re-evaluates all dynamic conditions, fast formulas, and the HR data used in dynamic conditions. It also re-evaluates all alert conditions.	Re-evaluate people's eligibility for the workforce compensation plan and worksheet compensation components.	Let the worksheet manager know that performance management ratings were updated and target ranges were adjusted.
Change worksheet data	When managers enter or change the value and leave the field, the worksheet re-evaluates the condition and corresponding results.  This trigger might slow worksheet performance. The more dynamic columns you use or the more conditions for the dynamic column, the longer the worksheet takes to respond. For example, you select this option on four dynamic columns, each with five conditions. When the manager tabs out of a	Calculate people's total compensation amount after managers make changes to current salary amounts.	Let the worksheet manager know that they're giving an individual more than the target and they need to provide a justification.



Triggering Event	Description	Dynamic Column Example	Alerts Example
	worksheet field, the worksheet evaluates all 20 conditions, regardless of whether the column has dynamic column settings. Use it for only column results that depend on data that changes in the worksheet.		

- Related Topics
- [Configure the Compensation Amount Dynamic Column of the Bonus Component to Reward High Performers](#)

## Descriptions for Dynamic Worksheet Column Conditions

You can add up to 1600 characters of meaningful description for the dynamic column condition. Make it clear to people reviewing the worksheet column configuration in later workforce compensation cycles what the purpose of the condition is.

You can also explain from where or when information from outside the worksheet came. Click the **Edit** icon next to the field to add or change text.

- Related Topics
- [Configure the Compensation Amount Dynamic Column of the Bonus Component to Reward High Performers](#)

## Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert

You can build a condition by selecting worksheet columns, operators, and values in the appropriate order. Use the Basic tab of the Edit Condition dialog box. You can build or edit a condition directly in the Column Results field on the Advanced tab.

### Reference

- For descriptions of every worksheet column, see Workforce Compensation Worksheet Configuration Definition (document ID 1450891.1) on My Oracle Support (support.oracle.com). You can also see this information:
- The navigation path for columns that map directly to a field in Oracle Fusion Global HR Cloud Service
  - If you can default column values using a plan cross-reference
  - If people can update the values in their plan budget and task worksheets.

To help you locate columns, the document Worksheet Configuration tab organizes information in the same groupings as the Configure Worksheet Page Layout pages.

#### Related Topics

- [Configure the Compensation Amount Dynamic Column of the Bonus Component to Reward High Performers](#)

## Configure the Compensation Amount Dynamic Column of the Bonus Component to Reward High Performers

Here's how you can configure the dynamic column of the Compensation Amount - Bonus component to calculate bonuses according to performance ratings.

For example, people with outstanding performance ratings get a bonus that's 10% of their annual salary. People who exceed expectations get a 5% bonus. People with other performance ratings don't get any bonus.

### Before You Start

You need to complete these configuration tasks before you can configure the dynamic column:

1. Create a workforce compensation plan using the **Workforce Compensation Plans** task.
2. Configure a bonus compensation component using the **Configure Compensation Components** task.
3. Configure performance management or compensation performance ratings that use a scale of 1 to 5 where **5** is **Outstanding** and **4** is **Exceeds**. Use the **Configure Performance Ratings** task.
4. Enable the appropriate performance rating columns and the **Compensation Amount** column of the bonus component using the **Configure Worksheet Display** task.

### Configure the Dynamic Compensation Amount Column

1. In the row for the bonus component **Compensation Amount** column, click the **Dynamic Column** icon.
2. On the Dynamic Column page, select the **Start compensation cycle** and **Refresh data** triggering events.

### Build the Condition for People with a 5 Rating

This condition identifies people with a performance management rating of 5 and awards them a bonus that's 10% of their annual full-time salary.

1. Click the **Add** icon.
2. In the **Sequence** field, enter **1**.
3. Identify the eligible people.
  - a. Under Condition, the **Create or Edit Expression** icon.
  - b. On the Edit Condition dialog box, Basic tab, click **Build Condition**.
  - c. In the **Column** field, select **Performance Management Overall Rating**.
  - d. In the **Operation** field that appears, select **Equals**.
  - e. In the **Fixed Value** field that appears, enter **5**.
  - f. Click **Done**.
  - g. Optionally, click **Validate**. On the confirmation, click **OK**.

- Click **Apply**.
- Award the 10% bonus.
  - On the Dynamic Column page, under Column Results, click the **Create or Edit Expression** icon.
  - On the Edit Column Result dialog box, Basic tab, select **Equation**.
  - Click **Switch to Column**.
  - In the **Column** field that appears, select **Annualized Full-Time Salary - Current**.
  - Click **Next**.
  - In the **Operation** field that appears, select **Multiplied by**.
  - In the **Fixed Number** field, enter **.1**.
  - Click **Done**.
  - Click **Apply**.
- Add the description.
  - On the Dynamic Column page, under Description, click the **Create or Edit Description** icon.
  - On the Description dialog box, enter **Award a 10% bonus to people with a performance rating of 5, which identifies them as outstanding**.
  - Click **Apply**.

## Build the Condition for People with a 4 Rating

This condition identifies people with a performance management rating of 4 and awards them a bonus that's 5% of their annual full-time salary.

1. Click the **Add** icon.
2. In the **Sequence** field, enter **2**.
3. Identify the eligible people.
  - a. Under Condition, the **Create or Edit Expression** icon.
  - b. On the Edit Condition dialog box, Basic tab, click **Build Condition**.
  - c. In the **Column** field, select **Performance Management Overall Rating**.
  - d. In the **Operation** field that appears, select **Equals**.
  - e. In the **Fixed Value** field that appears, enter **4**.
  - f. Click **Done**.
  - g. Optionally, click **Validate**. On the confirmation, click **OK**.
  - h. Click **Apply**.
4. Award the 5% bonus.
  - a. On the Dynamic Column page, under Column Results, click the **Create or Edit Expression** icon.
  - b. On the Edit Column Result dialog box, Basic tab, select **Equation**.
  - c. Click **Switch to Column**.
  - d. In the **Column** field that appears, select **Annualized Full-Time Salary - Current**.
  - e. Click **Next**.
  - f. In the **Operation** field that appears, select **Multiplied by**.
  - g. In the **Fixed Number** field, enter **.05**.
  - h. Click **Done**.
  - i. Click **Apply**.

5. Add the description.
  - a. On the Dynamic Column page, under Description, click the **Create or Edit Description** icon.
  - b. On the Description dialog box, enter **Award a 5% bonus to people with a performance rating of 4, which identifies them as exceeds expectations.**
  - c. Click **Apply**.

## Build the Condition for People with Lower Ratings

This condition identifies people with a performance rating that's less than 4 and doesn't award them any bonus.

1. On the Dynamic Column page, click the **Add** icon.
2. In the **Sequence** field, enter **3**.
3. Select **Default**.
4. Award no bonus to everyone who failed to meet the other two conditions.
  - a. Under Column Result, click the **Create or Edit Expression** icon for the expression you just created.
  - b. On the Edit Column Results dialog box, Basic tab, in the **Fixed Value** field, enter **0**.
  - c. Click **Done**.
  - d. Click **Apply**.
5. Add the description.
  - a. On the Dynamic Column page, under Description for the condition you just created, click the **Create or Edit Description** icon.
  - b. On the Description dialog box, enter **Don't award any bonus to people with a performance ratings below 4.**
  - c. Click **Apply**.

## Test the Dynamic Column Conditions

1. On the Dynamic Column page, click the **Test Condition and Column Results** icon.
2. On the Test Condition dialog box, complete the fields, as shown here.

Variable Name	Test Value
Performance Management Overall Rating	5
Annualized Full-Time Salary - Current	50000

3. Click **Test**.
4. Verify that the results are what you expected and click **OK**.

### Related Topics

- [Overview of Dynamic Columns in Workforce Compensation Plan Worksheets](#)

# When to Use a Fast Formula or Dynamic Column to Display Information in a Worksheet Column

You can vary worksheet column results using fast formulas and dynamic columns. The best method depends on the data you use, the complexity of the calculation, and how frequently you refresh worksheet data.

## Data Used

Fast formulas can use any Oracle Fusion application data with a database item. Dynamic columns conditions can use other worksheet columns.

## Calculations

Fast formulas can be anywhere from simple to complex with multiple compound conditions or multiple database records. Dynamic columns have simple if-then conditions or a few compound conditions.

## Initializing and Refreshing Values

For both fast formulas and dynamic columns, the **Start Workforce Compensation Cycle** process sets the initial column values. The **Refresh Workforce Compensation Data** process re-evaluates column values every time it runs with one of these options selected:

- Refresh column defaults
- Full refresh

Dynamic column values are also re-evaluated if the refresh process runs with the **Refresh dynamic columns** option selected. And they're re-evaluated every time a manager leaves a column field if the dynamic column configuration has **Change worksheet** selected.

## Configuration Process

You create formulas using the **Fast Formulas** task. You link them to worksheet columns using the **Properties** icon of the worksheet column. You build dynamic conditions using the **Dynamic Columns** icon of the worksheet column.

### Related Topics

- [Overview of Dynamic Columns in Workforce Compensation Plan Worksheets](#)
- [Formula Type Is Compensation Default and Override](#)
- [Overview of Using Formulas](#)

# Copy Dynamic Column Configurations

You can copy dynamic column configurations from one plan to another or from one column to another within the same plan.

Here's how you copy dynamic column configurations from one plan to another or from one column to another within the same plan:

1. Navigate to the Dynamic Column configuration page for the column you want to copy from.
2. Select the copy or duplicate icon on the toolbar. The Copy Dynamic Expressions page opens. On this page, you can copy dynamic calculation expressions from the current plan or select a different plan.
3. Select the plan. The **Source Display Name** list of values lets you select a dynamic calculation to copy. Only the columns that have dynamic calculations configured appear in the **Source Display Name** list of values. The **Column Names From** columns shows the column names used in the dynamic expression based on the selection.
4. Show either the **Current Plan** names or the **Source Plan** names. If more than one dynamic expression exists for a selected dynamic calculation, you can select and copy all or select some of the dynamic expressions to copy.
5. Select an option. The dynamic expressions are copied to the target column, and you receive a confirmation message.
6. Click **Done** to return to the Dynamic Column configuration page to view the copied expressions.
7. Save your changes. Newly added dynamic expressions have an icon to the left of the sequence number.

#### *Related Topics*

- [Overview of Dynamic Columns in Workforce Compensation Plan Worksheets](#)

# 50 Worksheets: Configuration Guidance for Salary and Budget Component Columns, and Promotion Effective Date

## Guidelines to Configure the Eligible Salary Component Columns

Many fast formulas and dynamic column conditions use eligible salary to determine percentages, such as allocation, target, and worker budget percentages. So when you use percentage columns, you need to configure the Eligible Salary column for each component enabled in the plan.

For example, you make eligible salary equal to each individual's current base pay. Or you might prorate their eligible salary according to various factors, such as length of service or geographic location. You need to configure the **Eligible Salary** column when the component budget pool stores budgets as percentages.

- To use a fast formula or derived factor to determine default values, you configure the column properties. You can copy and modify delivered samples of eligible salary proration formulas using the **Fast Formula** task in the Compensation work area. Use the samples with the **Compensation Default and Override** formula type.
- To build conditions that determine each individual's eligible salary, you configure the dynamic column settings.
- Worker budget percentages

### Related Topics

- [Default Value Properties of Worksheet Columns](#)
- [Overview of Dynamic Columns in Workforce Compensation Plan Worksheets](#)
- [Compensation Components in Workforce Compensation Plan Worksheets](#)
- [Formula Type Is Compensation Default and Override](#)

## Guidelines to Configure the Budget Amount - Worker Component Columns

You can use compensation fast formulas to calculate the default monetary amounts shown in the Budget Amount - Worker column of each enabled plan component. Or you can use dynamic column conditions to calculate the amounts.

Both formulas and conditions calculate the amounts in the individual's currency, determined by the local currency determination code of the compensation component. But, budget and task worksheets store the amounts in the plan currency. To calculate and show the correct results, dynamic column conditions need to divide the local currency value by the corresponding **Currency Conversion Rate** component column.

### Related Topics

- [Default Value Properties of Worksheet Columns](#)
- [Overview of Dynamic Columns in Workforce Compensation Plan Worksheets](#)
- [Compensation Components in Workforce Compensation Plan Worksheets](#)
- [Formula Type Is Compensation Default and Override](#)

## Guidelines to Allocate Compensation as Percentage of Budget

You can allocate compensation as a percentage of the budget pool instead of as a percentage of eligible salary or a flat amount.

If you enable the **Percentage of Budget** column for any component, here's what else you need to do:

- On the Configure Worksheet Page Layout page, Detail Table tab, disable the **Percentage of Eligible Salary** column for the corresponding component. Also make sure that the **Value remains unchanged** and **Rounding Rule** column properties aren't selected. Use the **Configure Worksheet Display** task.
- On the Configure Modeling page, disable these allocation methods using the **Configure Modeling** task.
  - Allocate n percent of eligible salary
  - Increase n percent of eligible salary

### Rounding Rules

The rounding rule set for the corresponding **Compensation Amount** column affects the amount calculated for the **Percentage of Budget Pool** column. For example, a manager whose overall budget is **900 USD** enters **4** in the **Percentage of Budget Pool** column. Here are the amounts when the corresponding **Compensation Amount** column does and doesn't have a rounding rule of **Round to the nearest 10**.

Column	Calculation	Amount with Rounding	Amount without Rounding
Component Amount	Entered Percentage / 100 * Overall Budget Amount  (4 / 100) * 900	40	36
Percentage of Budget	Compensation Amount / Overall Budget Amount	4.44	4

If you set a rounding rule for a **Compensation Amount** column, don't set a rounding rule for the corresponding **Percentage of Budget Pool** column. Or if you select **Use currency rounding** for the **Compensation Amount** column, don't select it and the rounding rule property for the **Percentage of Budget Pool** column. If you want to round the percentage instead of the compensation amount, you do the opposite. Set either the **Rounding Rule** or the **Use currency rounding** property for the Percentage of Budget Pool column. And make sure that neither property is set for the **Compensation Amount** column.



# Guidelines to Configure Default Values for the Promotion Effective Date Column

The batch processes for workforce compensation use promotion effective dates in plan worksheets to get new salary ranges and compa-ratios.

The processes also use the dates to get other salary metrics when the promotion includes a change to the person's grade. You can set a default effective date for everyone promoted through a workforce compensation plan using the **Configure Plan Cycles** task. Then, you can enable the **Promotion Effective Date** column in the appropriate task worksheets and configure the column properties.

- Let managers override the default date for individuals they promote during the compensation cycle.
- Specify whether the **Refresh Workforce Compensation Data** process refreshes the **Promotion Effective Date** column values.

Subject to Refresh	What Happens
Yes	<div><div>a.</div><div>b.</div><div>c.</div></div> <div>A manager overrides the default promotion effective date. The <b>Refresh Workforce Compensation Data</b> process changes the worksheet column date back to the default promotion effective date set for the plan cycle. The process uses the default date to refresh the corresponding salary metrics.</div>
No	<div>The <b>Refresh Workforce Compensation Data</b> process uses the promotion effective date to refresh the corresponding salary metrics. The date in the worksheet column is from either of these sources:</div> <div><div><div>○</div><div>○</div></div><div>Default promotion effective date for the plan cycle Manager-entered date</div></div>

Related Topics

- [Workforce Compensation Plan Cycle Dates](#)
- [Default Value Properties of Worksheet Columns](#)
- [Overview of Worksheet Display in Workforce Compensation Plans](#)
- [Refresh Workforce Compensation Data Process](#)

# Update Grade Step as Part of a Workforce Compensation Cycle

You can let managers update a person's Grade Step as a part of a workforce compensation cycle when you configure the worksheet display.

As a part of the column properties, only the Proposed Grade Step is included in the audit trail and allowed for updates. The Proposed Grade Step column is read only by default. You must explicitly choose to allow worksheet managers to update the column. All 3 new columns can be initially hidden, enabled, allow for role-based column access to be configured, and used in dynamic calculations and alerts. The columns are available for display in Individual Worker Display and Administer Workers.

## Proposed Grade Column When You Update the Grade Step

Depending on the criteria met for the assignment, values are shown from one of these sets: All Grades of the set, Valid Grades of Position and Job, or Grades of the assignment grade ladder.

- When the assignment doesn't have a Grade Ladder and if the profile option `PER_ENFORCE_VALID_GRADES` is disabled the Proposed Grade list of values shows all the Grades available for the respective set.
- When the assignment doesn't have a Grade Ladder and if the profile option `PER_ENFORCE_VALID_GRADES` is enabled the Proposed Grade list of values shows all Valid Grades available depending on the Position or Job for the respective set.
- When the assignment has a Grade Ladder, regardless of the value of the profile option `PER_ENFORCE_VALID_GRADES`, the Proposed Grade list of values shows the Grades with respect to the Grade Ladder.

## Worksheet Effects When You Update the Grade Step

The Proposed Grade Step column shows the steps of a Grade if the Grade is part of a Grade Ladder configured to use Grade and Steps.

When you select a Grade using the Proposed Grade column, and if the Grades are from a Grade Ladder configured to use Grade and Steps, the first Step in the sequence shown by default. Worksheet managers can change or override it with any of the Steps from the list of values. When the Proposed Grade column isn't filled with a selected Grade and if the current Grade is part of a ladder that configured to use Grade and Steps, the Proposed Grade Step drop down shows the respective Steps for the current Grade. In a scenario where the Proposed Grade or Current Grade doesn't have Steps, the Proposed Grade Step list of values remains blank.

**Note:** The Compensation Amount Column you selected to post as salary is READ-ONLY for people with a Grade Ladder with Include salary updates set to Yes. Their compensation amount is calculated based on the value selected in the Grade Step column.

## Base Salary - New Column When You Update the Grade Step

When a Grade Step is proposed in the worksheet, it automatically fetches the Step value as the new base salary, subject to these conditions:

- The Grade Ladder should be of type Grade and Step.
- The Grade Ladder should have Include salary updates set to Yes.
- The Grade Ladder should have Salary Calculation Method set to Use grade step rate.
- There should be only one component in the Workforce Compensation plan that has its compensation amount set to Post as salary.
- Worker's salary basis type isn't Salary Rates or Simple Components.

If the Proposed Grade Step's value can't be determined, the Base Salary - New column in the worksheet (along with the associated compensation amount column) is set to null. This happens in these cases:

- The Grade Ladder's currency doesn't match the base salary currency of the worker.
- The Proposed Grade Step doesn't have a value defined in the Grade Ladder.

The Base Salary - New (along with the associated compensation amount column) becomes read-only. You can only propose it by selecting a Proposed Grade Step when these conditions are met:

- The Grade Ladder is of type Grade and Step.
- The Grade Ladder has Include salary updates set to Yes.

In other cases, the column behavior remains as before. The application calculates the Base Salary - New based on the Step value using this formula:

$$\text{Base Salary - New} = (\text{Step Value} * \text{Step Annualization Factor}) / (\text{Pay Annualization Factor})$$

If the base salary frequency of the worker isn't hourly and Salary Adjustment Type of the ladder is set to a value other than blank (FTE less than 1 only OR FTE not equal to 1) and the FTE of the worker's assignment matches the selection, then FTE adjustment happen using this formula:

$$\text{Base Salary - New} = (\text{Step Value} * \text{Step Annualization Factor} * \text{FTE of the worker's assignment}) / (\text{Pay Annualization Factor})$$

## Downloaded Workbook When You Update the Grade Step

If you select the Manage in Workbook option the downloaded workbook has these columns: **Current Grade Ladder**, **Current Grade Step**, and **Proposed Grade Step**.

The first 2 are read-only columns and the last one is editable according to how you set up the preferences. The downloaded workbook works the same way the worksheet does.

People can select Proposed Grade Step values either from the list of values of the **Proposed Grade Step** column by double-clicking on the respective cell or by entering a value in the cell and uploading it.

**Note:** The Proposed Grade Step list of values shows the values according to the existing Grade or Proposed Grade value. If people select a new Proposed Grade in the downloaded workbook the Proposed Grade Step list of values shows step values according to the old Grade or Proposed Grade value until the new Proposed Grade is uploaded.

If people enter a valid Proposed Grade value but an invalid Proposed Grade Step value, the upload fails.

# 51 Worksheets: Miscellaneous Rate Component Columns, User-Defined Columns, and External Data in Task Worksheets

## Miscellaneous Rate Component Columns and User-Defined Columns

You can include your own numeric, text, and list information in worksheet columns of workforce compensation plans.

### Miscellaneous Rate Component Columns

You can share numeric values with managers and let them enter their own values using the six miscellaneous rate columns under the component groups. For example, you want to use a target stored outside the plan to calculate bonuses. All six columns are updatable and you can default values for them using a plan cross-reference. But, if an individual isn't eligible for the component, managers can't edit their value.

With these columns, you can show totals for the detail table population in the summary table view.

### User-Defined Columns

You can share numeric, text, and list values with managers and let them enter or select their own values by configure user-defined columns. For example, you want to include external stock data, such as vested and unvested shares and the vesting date. All user-defined columns are updatable and you can default values for them using a plan cross-reference.

The numeric columns can display any numeric value and the text columns can display any text value. **List Column 46** displays the values that you define in the **CMP\_CWB\_CUST\_COL\_46\_LIST** lookup type. **List Column 47** displays the values that you define in the **CMP\_CWB\_CUST\_COL\_47\_LIST** lookup type, and so on, for list columns 48 -- 50. You can override the default lookup type and use a different lookup type. To edit the default lookup types and create your own, use the **Lookups** task in the Compensation work area.

You can't show totals for these columns in the summary table view because they aren't available to enable there.

#### *Related Topics*

## Configure User-Defined Columns of a Workforce Compensation Plan Worksheet to Show External Data

Here's how you configure user-defined worksheet columns to show external data in a workforce compensation plan.

1. In the Compensation work area, click **Workforce Compensation Plans**.
2. On the Workforce Compensation Plans page, create the plan or search for and open an existing plan.

3. On the Define Workforce Compensation page, under Worksheets, click **Configure Worksheet Display**.
4. On the Configure Worksheet Display page, in the worksheet task row, click the **Configure Task Layout** icon.
5. On the Configure Worksheet Page Layout page, click the Detail Table tab.
6. Expand the **User-Defined Columns** group.
7. Enable the text, numeric, or list column, depending on what type of external data you're showing in the column.
8. Give the column a meaningful display name, such as **Prior Bonus Amount** or **Target Information**.
9. Configure the external data record type and column properties.
10. Save your changes and configure more columns or save and close the task worksheet.

*Related Topics*

- [Record Type Lookups for External Compensation Data](#)

# 52 Worksheets: Default Worksheet Display and Individual Worker Display

## Default Display Settings for Workforce Compensation Plan Worksheets

You determine display defaults for worksheets when you configure the default worksheet display. For example, you can set the team filter to default to Direct reports or to Direct reports if total workers exceeds 30, else show all.

Setting the team filter to an option other than **All workers** improves worksheet performance when managers switch from list to tree view in the detail table.

You can also set default visible rows and row height and frozen columns. You can set the detail table to show as a list or tree by default. And you can specify whether worksheet information, worksheet summary, and table filters are open or closed by default.

**Tip:** Managers can override these plan-level defaults by specifying their own default display settings in their worksheets.

### Related Topics

- [Overview of Worksheet Display in Workforce Compensation Plans](#)

## Overview of Individual Worker Display in Workforce Compensation Plan Worksheets

You can let managers view information about each individual in their worksheet by configuring the individual worker display. Depending on how you configure the page, managers can also allocate compensation, promote the individual, add notes and attachments, and view alerts.

You start by specifying whether the page shows the individual's information using up to 10 infotiles or as a single scrolling page. You can include up to 15 sections on the scrolling page and per infotile. If you have more than 15 sections that you want to share with managers, you need to use infotiles. Managers click each infotile to see the related sections.

You can also use infotiles to provide managers with more focused information to review and possibly change. For example, you configure one infotile to show person information. You add a section that shows the individual's details, such as their country, eligibility status, and email. And you add another section to show their assignment details, such as legal employer, location, department, direct manager, and years employed. Then you configure another infotile to show salary information. It has one section that shows summary information and another section that shows current salary. A third section lets managers allocate salary.

After you decide how you want to present information on the individual worker page, you add sections. Then you configure the content for each section. At any point along the way, you can save your current settings and preview what managers would see. The data fields are blank because the preview doesn't know about any specific individual.

## Individual Worker Page Content in Workforce Compensation Plan Worksheets

You add content to the individual worker page by adding sections. The single scrolling page and each infotile can have up to 15 sections.

Content Type	Content Source
Predefined Content	<ul style="list-style-type: none"><li>Specific worksheet columns that are also available when you configure a task worksheet display, such as alerts, attachments, notes, job, performance, and salary histories.</li><li>Oracle Transactional Business Intelligence reports. Use the <b>Properties</b> icon to add any OTBI and Oracle Business Intelligence Enterprise Edition reports from the <b>/shared/Custom/Human Capital Management/Compensation</b> folder.</li></ul>
Salary Simple Components	<p>The same summary columns that are available when you configure a task worksheet display and all of the simple components in the salary table. You can configure column properties, but any changes also affect the summary columns of the task worksheets.</p> <p>Not every simple component that you enable applies to every individual. Managers see only the components configured for the individual's salary basis.</p>
Summary	The same summary columns that are available when you configure a task worksheet display. You can configure column properties, but any changes also affect the summary columns of the task worksheets.
Worksheet Columns	The same worksheet columns that are available when you configure a task worksheet display. You can configure column properties and dynamic columns, but any changes also affect the detail table columns of the task worksheets.
Salary Rates	Rate data from the salary tables as of the HR data extraction date

You use different sections with different content types to add a mix of information about the individual to the page. For example, you add an employment section with worksheet columns. You add job and performance history sections with predefined content. And you add a salary summary section with summary columns.

**Tip:** The predefined content renders best when you add one option per section. For example, if you want to include alerts and attachments, add one section for alerts and another section for attachments. Don't combine them in a single section.



*Related Topics*

- [Overview of Worksheet Display in Workforce Compensation Plans](#)
- [Configure the Summary Display for Compensation Task Worksheets](#)
- [Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Overview of Dynamic Columns in Workforce Compensation Plan Worksheets](#)



# 53 Worksheets: Alerts

## Overview of Alerts in Workforce Compensation Plan Worksheets

You can use alerts to let worksheet managers know about issues that require their attention. You enable alerts to appear in the task worksheets of workforce compensation plans using the **Configure Worksheet Display** task.

You enable predefined alerts and build and enable your own alerts using the **Configure Alerts** task. The triggering events for the alerts that you build are the same as the events for dynamic columns. And how you build alert conditions is the same as building dynamic column conditions. To test each alert condition that you build, use the **Test alert conditions** icon on the toolbar.

Alert names are the actual alert that managers see in their worksheets. You show them additional information, such as how to fix an issue, in the description. For example, you have an alert titled **Can't allocate more than target**. The description is **Adjust this individual's allocation to be less than or equal to the target**.

### Related Topics

- [Include Alerts in Task Worksheets](#)
- [Triggering Events for Conditions of Dynamic Columns and Alerts](#)
- [Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert](#)

## Predefined Alerts for Workforce Compensation Plan Worksheets

To notify managers about issues in their worksheet that need their attention, you can enable predefined alerts using the **Configure Alerts** task.

Predefined Alert	When the Alert Appears in a Worksheet
Salary changed in HR	Salary amount changed in HR
Allocation outside target range	Compensation amount for the component is less than the target minimum or greater than the target maximum configured in the column properties
Grade changed in HR	Grade changed in HR
Worksheet manager does not match line manager	Worksheet manager doesn't match line manager on the individual's employment record
New salary outside salary range	New salary amount is less than the salary range minimum or greater than the salary range maximum for the individual's current grade
Worker was terminated	Individual's employment was terminated in HR

Predefined Alert	When the Alert Appears in a Worksheet
Outside Defined Limits	Compensation minimum or maximum amount is outside of the limits set for the column

## Alert Types for Workforce Compensation

When you create an alert, you select an alert type from several options.

Most are just informational but **Error preventing save** and **Error preventing submit** affect worksheet actions. For these two alert types the best practice is to use only the **Change worksheet data** trigger event. If you select one or both of the other triggering events the error prevention save or submit won't take place.

## Example Alert to Warn Managers That Their Allocated Compensation Amounts Changed

You want to warn managers when someone else changes a component compensation amount that they entered for an individual.

Field	Value
Name	Someone changed the compensation amount
Type	Warning
Criteria	<b>Original Amount Updated By - Component 1</b> column is not equal to <b>Compensation Amount Last Updated By - Component 1</b> column
Description	Someone overrode the compensation amount that you entered.
Triggering Events	NA

### Related Topics

- [Triggering Events for Conditions of Dynamic Columns and Alerts](#)
- [Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert](#)

## Example Alert to Prevent Managers from Allocating More Than the Targeted Compensation

Your company policy prohibits managers from allocating more compensation than is targeted for an individual.

Field	Value
Name	Allocation can't exceed the target
Type	Error preventing submit  <b>Note:</b> This type prevents managers from saving or submitting their worksheet until they resolve the issue.
Criteria	<b>Compensation Amount - Component 1</b> column is greater than <b>Compensation Target - Component 1</b> column
Description	You need to adjust the compensation amount you allocated to this person because it can't exceed the target amount.
Triggering Events	NA

#### Related Topics

- [Triggering Events for Conditions of Dynamic Columns and Alerts](#)
- [Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert](#)

## Example Alert to Notify Managers When the New Base Salary Is Greater Than the Range Maximum

Your company policy prohibits managers from allocating more compensation than is targeted for an individual.

Field	Value
Name	New base is over the range maximum
Type	Information
Criteria	<b>New Base Salary</b> column is greater than the <b>Salary Range Maximum - Current</b> column or <b>New Base Salary</b> column is greater than the <b>Salary Range Maximum - New</b> column
Description	The individual's new salary exceeds their salary range maximum.
Triggering Events	NA

#### Related Topics

- [Triggering Events for Conditions of Dynamic Columns and Alerts](#)
- [Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert](#)



# 54 Worksheets: Assignment Segments

## Overview of Assignment Segments in Workforce Compensation Plan Worksheets

You can include prorated values for relevant component worksheet columns in a separate table in the worksheet when you configure assignment segments.

Rather than multiple columns in the detail table, you can show the information using separate rows for each segment. And you can let managers make changes in the relevant fields. For example, the bonus amount for this person 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	2,473
Mar 15	Dec 31	82,500	USD	292	.8 (292/365)	66,000	20	13,200	1.1	14,520
										16,995

The segment values, in this case payout amounts, are summed and shown in the table footer. When the manager clicks **Apply**, the total passes to the read-only worksheet column that you specified.

**Tip:** It's important that when you configure assignment segments, you start with the end in mind. Identify what data you need to store, what you want to calculate, and what data is and isn't editable.

## Basic Process to Configure Worksheet Assignment Segments

Here's the basic process to include assignment segments in a compensation, detail table only, performance, or promotion task worksheet. All tasks are in the Compensation work area.

1. Load your assignment segments using the **External Data** task.
2. Make sure that all of the compensation cycles are closed for the workforce compensation plan. This way you have all configuration options available because certain options aren't available to open cycles.

3. Identify the compensation component you want to use for assignment segment. Also identify the amount column to use for the assignment segments. It can be the **Compensation Amount** column or one of the six miscellaneous rate columns for the component. This column is how you can feed segment totals to worksheet summary views. You can also use the totals as default values for the selected column in the detail table of the worksheet.
4. Configure only one of the five available compensation components for assignment segments. Use the **Configure Compensation Component** task. You need to configure a component that isn't mapped to salary rates and doesn't have salary rates mapped to it.
5. Enable the **Assignment Segments** column in the **Additional Information** group of the detail worksheet table using the **Configure Worksheet Display** task.
6. Enable and configure the assignment segments using the **Configure Assignment Segments** task. To reduce horizontal scrolling, enable try to enable no more than 10 columns. To give managers a more robust view of the assignment segment table, select **Show detach icon**.

Just like for all worksheet columns, you can set meaningful display names and change the default sequence. You can also set properties for assignment segment columns. The specific properties you can set depend on the column.

- General, such as column shading, rounding rule, and decimal precision
  - For one numeric segment column, you need to set **Selected for Totaling to Yes**.
  - For each segment column you want to include in worksheet audit trails, you need to select **Include in audit trail**.
- Visibility and access, such as line managers can only read the column data but compensation administrators can read and edit it
- Default value, such as a specific number or text, or values provided by a specified formula, compensation derived factor, or from a cross-referenced column
  - For each segment column the **Refresh Workforce Compensation Data** process should update after people make changes, you need to select **Default value subject to refresh**.
- Information, such as the calculation or dynamic column condition used to determine the segment column amounts or the source of the segment column data

For many segment columns, you can also build dynamic conditions, for example, to determine the proration factor.

To let managers view changes to assignment segments in worksheet audit trails, for only one segment column, select **Audit Differentiator**.

If you change **Enable Assignment Segments** to **No**, you delete all segment configurations. Changing it back to **Yes** won't restore the configurations. If you leave the page before saving the change to **No**, you can restore any configurations saved before you set **Enable Assignment Segments** to **No**.

#### Related Topics

- [Configure Assignment Segments Options of a Compensation Component](#)
- [Configure the Summary Displays for Communication, Performance, and Promotion Task Worksheets](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Default Value Properties of Worksheet Columns](#)
- [Overview of Dynamic Columns in Workforce Compensation Plan Worksheets](#)



## Data for Worksheet Assignment Segments

Assignment segment data can come from HR or from third-party or legacy application. To use it in worksheet columns of a workforce compensation plan, it has to be in the external data table.

To use the external data specifically in assignment segments, each row needs to include all of this information:

- An end date
- An assignment number
- A job

When you load monetary segment amounts, you need to convert them to the same currency the individuals use, as of the HR data extraction date.

You can use up to 50 of the available 65 user-defined assignment segment columns at a time. The user-defined columns are 50 numeric, 15 text, and 5 date columns. Keep in mind you're repeating data in rows instead of in columns and most likely won't need all 50.

You can also use these columns. They're automatically available on the Configure Assignment Segments page and you don't need to map them to user-defined columns:

- Person Name
- External Worker Data ID
- Assignment Number
- Legal Employer
- Worker Number
- Job
- Record Type
- Start Date
- End Date
- Eligibility Status
- Sequence Number
- Currency Code

The column that you use to show the assignment segment totals needs to be read-only in the worksheet.

### *Related Topics*

- [External Compensation Data](#)
- [Default Value Properties of Worksheet Columns](#)
- [Configure User-Defined Columns of a Workforce Compensation Plan Worksheet to Show External Data](#)
- [Example of Loading External Data](#)

## Visibility, Ability to Update, and Restrictions for Worksheet Assignment Segments

Compensation administrators can see all assignment segment columns of a workforce compensation plan when they administer workers. This includes where segment data that's loaded but not showing for the worksheet manager.

Whether managers can see assignment segments depends on the configuration. This includes whether you specify to **Show ineligible rows** when you configure assignment segments. Also, managers need to have the detail table in list, not tree, view to see the Assignment Segments table configured for the worksheet. And even if managers can see rows with a status of **Ineligible**, they can't make changes to any values in those segment rows. They also have read-only access to segment rows where the individual's assignment is processed or partially processed and if they have read-only worksheet access.

You can specify Role-Based Overrides for assignment segment columns. Role based overrides take precedent over the main column visibility and access settings, which determine visibility and access for all other roles.

Here's what else managers can't do when you enable assignment segments for the worksheet:

- 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**.

### Related Topics

- [Default Display Settings for Workforce Compensation Plan Worksheets](#)
- [Visibility and Access Properties of Worksheet Columns](#)
- [Detail Table Configuration for Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)

## Eligibility of Worksheet Assignment Segments

You can use the configured workforce compensation plan or compensation component eligibility when you configure eligibility for assignment segments. Both eligibility configurations use the segment end date to validate if the segment is eligible or not.

Or you can load a value in an external data column and map it to the **Eligibility Status** column on the Configure Assignment Segments page. If a row in the assignment segment table has a value in the external data column, the segment status is **Eligible**. If the row is blank, the status is **Ineligible**.

Only the **Refresh Workforce Compensation Data** process or a compensation administrator using the **Administer Workers** task can change segment eligibility. The manager eligibility change action doesn't affect the assignment segment table.

#### Related Topics

- [Workforce Compensation Plan Eligibility](#)
- [How Required and Optional Profiles Determine Compensation Eligibility](#)
- [Eligibility Profiles of Compensation Components](#)

## The Start Workforce Compensation Cycle Process and Assignment Segments

Data has to exist in the external data table before you run the initial Start Workforce Compensation Cycle process for a workforce compensation plan. Running the process again won't fill in any missing rows or add new external data rows.

- They meet the selected criteria.
- They have an end date between the evaluation period start date of the plan cycle and the process effective date.

When you run the **Start Workforce Compensation Cycle** process, it considers only those external data rows specific to the plan assignments. The rows need to have an end date. And the end date has to be between the evaluation period start date and the HR data extraction date.

The process considers data in the external data table as a part of assignment segments if these conditions are true:

- The end date of the row is between the evaluation period start date and HR data extraction date. Or, the row end date is between the evaluation period start date of the plan cycle and the person's employment termination date. This way the process gets assignment segment rows for terminated workers.
- The date columns use the format **YYYY/MM/DD**.

After you run the **Start Workforce Compensation Cycle** process, you can change certain editable plan configuration settings, including these:

- **Record Type** on the Configure Assignment Segments page
- **Amount Column for Assignment Segments** on the Edit Component dialog box opened from the Configure Compensation Component page

#### Related Topics

- [Basic Process to Configure Worksheet Assignment Segments](#)
- [Configure Assignment Segments Options of a Compensation Component](#)

# The Refresh Workforce Compensation Data Process and Assignment Segments

To support assignment segments, you can run the Refresh Workforce Compensation Data process with one or more of these parameters selected:

- Refresh assignment segments data: Includes updating dynamic columns for assignment segments, the worksheet, and summary totals.
- Re-evaluate assignment segment eligibility.
- Refresh dynamic columns for assignment segments.

When you select **Full Refresh**, you select all assignment segment options.

Before you can refresh assignment segment data, has to exist in the external data table. Also, the **Start Workforce Compensation Cycle** process has to have evaluated it.

You can't delete a segment row and use the refresh process to remove the information. You can use the refresh process to update the worksheet after managers update data. The appropriate segment columns have to have with the **Default value subject to refresh** property selected for the refresh to work.

## *Related Topics*

- [Basic Process to Configure Worksheet Assignment Segments](#)

# 55 Modeling, Reports, Filters, and Plan Analytics

## Overview of Modeling in Workforce Compensation Plan Worksheets

Let managers and administrators explore scenarios and align their budgets and compensation allocations with organizational pay practices using worksheet models in their workforce compensation plans.

First, you enable the create, update, and apply worksheet actions when you configure worksheet display. Then you set general options and enable model sharing, usage, and allocation methods when you configure modeling. Each method determines the values that managers and administrators can enter in their models, and how the model calculates and applies the results.

For example, you specify whether only administrators or both managers and administrators can access models. You also specify whether managers can create their own models, manage models in the integrated workbook, and how they can share models. For both managers and administrators, you enable model usages that determine how they can apply model results. You can let them apply the results as actual compensation, budget, and target amounts, or a combination of these options.

### Numeric Properties

The general properties of numeric columns in models vary depending on where managers and administrators view the model information. For example, model numeric columns on the Model Summary page have properties from the summary table view of the corresponding budget or task worksheet. This includes the **Overall Compensation Amount** summary component columns. Model numeric columns in the detail table have properties from the detail table of the corresponding budget or task worksheet.

#### *Related Topics*

- [Include Models in Task Worksheets](#)
- [General Properties of Worksheet Columns](#)
- [Actions Configuration for Communication, Compensation, Detail Table Only, Performance, and Promotion Worksheets](#)
- [Performance Considerations for Workforce Compensation Plans](#)
- [Allocation Methods in Workforce Compensation Models](#)

## Overview of Reports in Workforce Compensation Plans

Let administrators and managers view key information in their workforce compensation plans when you configure reports.

For example, give administrators the reports they need to optimize compensation budgets and allocations across their client groups. Give line managers reports with contextual and background information about their people so they can make informed compensation allocations.

You can use delivered reports or add Oracle Transactional Business Intelligence (OTBI) and Oracle Business Intelligence Enterprise Edition (OBIEE) reports. You can add any OTBI and OBIEE reports save in the **shared/custom/HCM/Compensation** folder to a workforce compensation plan. And you can give the reports display names that are meaningful to the plan audience. Removing OTBI and OBIEE reports from the Configure Reports page removes them from only the plan. The source reports remain unaffected.

**Tip:** Each workforce compensation plan can include up to 25 reports.

#### Related Topics

- [Performance Considerations for Workforce Compensation Plans](#)

## Administrator and Line Manager Access to OTBI and OBIEE Reports Used in Workforce Compensation Plans

To view and create Oracle Transactional Business Intelligence (OTBI) and Oracle Business Intelligence Enterprise Edition (OBIEE) reports, people need to have the Compensation or Line Manager role. To set up workforce compensation plans, they also need the Compensation Administrator role.

To view OTBI and OBIEE reports in their workforce compensation plans, people need the **Compensation Transaction Analysis** duty role. This role is included in both the **Compensation** and **Line Manager** job roles.

#### Related Topics

- [Overview of Reports in Workforce Compensation Plans](#)

## How You Add Dashboard OTBI Reports to the Workforce Compensation Landing Page

Here's how you can use Page Composer to add dashboard OTBI reports to the Workforce Compensation landing page.

1. Go to Navigator > Tools > Reports and Analytics.
2. Create your first analysis using the Workforce Compensation subject area.
3. Create your dashboard prompts.
4. Create a dashboard and add both.
5. Go to the worksheet landing page and select your plan.
6. Go to Settings and Actions > Edit Pages > Activate Sandbox > Enable Page Composer.
7. On the Add Content tab, click **Add Content**.
8. Go to Reports and Analytics, find your dashboard, and click **Add**.
9. Review your dashboard and publish your sandbox.

#### *Related Topics*

- [Overview of Reports in Workforce Compensation Plans](#)
- [Overview of Landing Page Analytics in Workforce Compensation Plans](#)
- [Create a Sandbox and Make It Active](#)

## Dimensions and Range Increments in Worksheet Models and Plan Reports

Dimensions are attributes that you use to group data in reports for workforce compensation plans. You also use them as criteria when building worksheet models.

For example, reports can analyze compensation allocations by country and job dimensions to see how average allocations vary. Models can automatically allocate salary adjustment amounts to people who work in specified country and location dimensions.

You enable the dimensions that have meaning to your organization within the context of the plan when you configure reports. Here are some examples of delivered dimensions:

- Country
- Department
- Years of service
- Performance management rating
- Location
- Job
- Position
- Grade

You can also use delivered job attributes, grade attributes, user-defined worksheet columns, and compensation attributes, to define your own dimensions for reports and modeling criteria.

## Range Increments

Instead of showing a separate data point for each person, report graphs and tables and model tables show aggregated data for groups of people. You set compa-ratio, salary range position, years employed, and performance management calculated rating range increments as appropriate for the plan reports and models. For example, you have a plan that uses compa-ratio to group data in increments of 10 percentage points. The plan reports and models group together everyone whose compa-ratio falls between 10 and 20, 20 and 30, 30 and 40, and so on.

#### *Related Topics*

- [Include Models in Task Worksheets](#)
- [Overview of Modeling in Workforce Compensation Plan Worksheets](#)
- [Overview of Reports in Workforce Compensation Plans](#)
- [Create a Workforce Compensation Model](#)

## Overview of Filters in Workforce Compensation Plan Worksheets and Reports

Let managers sort the populations in the worksheets of their workforce compensation plans by configuring filters. For example, you can enable Alerts, Country, Department, Location, and Job filters. The filters you can enable include 6 job attribute, 3 grade attribute, and 15 text column filters.

You can also enable advanced filters by building relevant conditions that only compensation administrators, or both administrators and plan managers can use. Filter conditions have only the Basic tab, while alerts and dynamic columns also have the Advanced tab.

### Related Topics

- [Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert](#)
- [Overview of Reports in Workforce Compensation Plans](#)

## Overview of Landing Page Analytics in Workforce Compensation Plans

You can include analytics for the entire workforce compensation plan at the bottom of the plan page. Be sure that when you make the predefined titles more meaningful for the plan audience, the changes don't exceed 40 characters, including spaces.

Analytic	Description
Average Allocation Amount	A meter gauge analytic available per component that shows the average allocation amount for that component. The percentage is calculated from the total number of individuals that report to the primary plan manager.
Workers Compensated	A meter gauge analytic available per component that shows the percentage of compensated individuals. The percentage is calculated from the total number of individuals that report to the primary plan manager.
Budget Usage	A bar chart showing how much budget remains for the primary plan manager. The budget amount is based on the total budget for the manager.
Manager Submitted	A meter gauge analytic showing the number of subordinate plan managers who have submitted their plan changes for approval. The number is the total number of subordinate managers who report to the primary plan manager, including managers who report indirectly.
Workers Promoted	A meter gauge analytic showing the number of people promoted as a part of the compensation cycle. The number is based on the total number of eligible individuals reporting to the primary plan manager.

### Related Topics

- [General Structure of Workforce Compensation Plans](#)



# 56 Validation and Processing

## Overview of Plan Validation and Starting the Workforce Compensation Cycle

After you finish the foundation, budgets, worksheets, and models and reports configurations for the workforce compensation plan, you validate the plan. Then you start the compensation cycle.

### Validate Plan Setup

To check dependencies among the various plan configurations and make sure that all existing conditions work, use the **Validate** button. Correct any errors listed on the Validation Results page and validate the plan again, repeating as needed until you don't get any errors.

**Tip:** This validation doesn't include the formulas, payroll elements, eligibility profiles, and other objects linked to the plan.

### Start Workforce Compensation Cycle

After you finish validating the plan setup, you build the task worksheets for this plan using the **Start Compensation Cycle** button.

- The first time you run the **Start Workforce Compensation Cycle** process for the plan, you might want to make it a trial run.
- If you have issues with running the process, you may want to include trace statements in the log file.
- If you're using compensation tables in Oracle Transactional Business Intelligence (OTBI), you want to start the **Synchronize Hierarchy** process after the cycle process completes.
- For a thorough test, you might want to include recently terminated workers to check that the various task worksheets show what you expect.

#### *Related Topics*

- [Eligibility Profile Testing for a Workforce Compensation Plan](#)
- [Eligibility Profile Testing for a Compensation Component](#)
- [Formula Execution Errors](#)



# 57 Global Compensation Settings

## General and Watchlist Global Settings for Workforce Compensation Plans

You can configure global settings that affect all workforce compensation plans and plan managers. You can override various global settings when you configure workforce compensation plans.

### General

You can let managers switch to a subordinate manager and move among that manager's plans. You can also validate country budgets, set how many recently searched managers to display, and enable click-to-edit in task worksheets. And you can include the **Save and Close** button on task worksheets, either as an additional option on the standard **Save** button or beside it. To aid managers with worksheets for different assignments, you can enable up to two assignment differentiators, such as **Job** and **Location**. The differentiators then show in hover text for the plan switcher as well as in plan, budget, and worksheet headers.

### Watchlist

You can show managers the number of active budget pools and plans in their watchlists. You can also show them their newly published budgets and newly active plans. And you can set the number of days that the budget and plan information remains in their watchlists.

## Global Setting Options for Workforce Compensation Plan Notifications

Here's a full list of the options you can select when you configure global notification settings for workforce compensation plans. You can also select these options when you override the global settings using the Configure Approvals and Notifications task.

The available options in both tasks depend on the setting.

Notification Option	Description
Notify	Always send notifications, such as when budgets and plans are published or withdrawn, or when changes are approved.
Prompt manager	Send notifications for actions only if the initiating manager selects, such as when plan access changes.
Approval required	Require approval, such as for eligibility changes and worker reassignments.
Disable	Disable notifications so that none are sent, such as when individuals are delegated or removed from delegation.

*Related Topics*

- [Configure Notifications for Workforce Compensation Plan Worksheets](#)

## How Workforce Compensation Plan Notifications Work

Here's an explanation of how and when each notification for a workforce compensation plan is sent. The explanation covers who initiates sending the notification, who gets it, and what the recipient can do with it.

It also covers when notifications are bypassed. You enable these notifications using the **Configure Global Settings** task. You can override the settings in workforce compensation plans using the **Configure Approvals and Notifications** task.

Notification	Initiating Action	Initiator	Recipient	Actions Available to the Recipient	Condition Causing Bypass of Notification
Budget Published	Manager's plan status changes from <b>Not Started</b> to <b>Budget Available</b>	Manager who published a budget to subordinate managers	Subordinate manager receiving a published budget amount	Close	None
Worksheet Submitted	Manager's plan status changes to <b>Submitted</b>	Primary worksheet manager or switched to manager	Manager one level above the submitter in the plan hierarchy, or the specified alternate approver	Approve Reject	Submitting manager is the highest-level approver in the hierarchy
Worksheet Returned for Correction	Manager's approval status for the plan changes to <b>Return for Correction</b>	Higher-level manager, specified alternate approver, or switched manager who returned the subordinate manager's plan	Manager whose plan was returned for correction	Close	None
Worksheet Approved by Higher-Level Manager	Manager's worksheet status changes to <b>In Approvals</b>	Higher-level manager or specified alternate approver who approved plan changes using the submit notification, or switched manager who approved the changes in their own plan approval task. The higher-level manager isn't the final approver	Manager whose plan status changed to <b>In Approvals</b>	Close	Manager's plan access is <b>No Access</b>
Final Approval Obtained	Manager's plan status changes to <b>Fully Approved</b>	Top-level approver or specified alternate approver who approved a subordinate manager's plan changes using the submit for approval notification	Manager whose plan is approved and all of their subordinate managers	Close	Manager's plan access is <b>No Access</b>

Notification	Initiating Action	Initiator	Recipient	Actions Available to the Recipient	Condition Causing Bypass of Notification
		or the approval action from the worksheet			
Plan Access Changed	Higher level manager selects <b>Change Access for All Managers</b> or <b>Change Access for Selected Managers</b> from the worksheet	Manager who changed another manager's plan access	Manager whose plan access was changed	Close	None
Worksheet Withdrawn	Manager clicks <b>Withdraw Submission</b>	Primary worksheet manager who previously submitted the worksheet	Approver who received the original worksheet submitted notification from a subordinate manager	Close	None
Budget Withdrawn	Manager clicks <b>Withdraw All Budgets</b> or <b>Withdraw Selected Budgets</b>	Manager who previously published a budget to a subordinate manager	Subordinate manager for whom a budget amount was previously published	Close	None
Due Date Changed	Manager changes a due date for an individual manager or selects <b>Change Due Date for All Managers</b> on the <b>Action</b> menu	Higher-level manager or administrator	Subordinate manager whose worksheet due date changed	Close	None
Worksheet Overridden by Higher Manager	Manager or administrator changes a compensation amount column that another manager supplied, and clicks <b>Save</b>	Manager who modified an amount or administrator	Manager or administrator who originally supplied the amount	Close	None
Request for Information	Manager selects one or more managers on the approval task page, and clicks <b>Request Information</b>	Manager who requested information	Selected managers	Reply, which opens a dialog box to reply to the sender  Close	None
Delegate Worker	Manager selects one or more individuals on the worksheet and selects <b>Delegate Workers</b> on the <b>Action</b> menu	Primary worksheet manager	Manager selected to review the individuals	Dismiss Approve Reject	None
Remove Worker Delegation	Manager selects one or more individuals on the worksheet and selects <b>Remove Delegations</b> on the <b>Action</b> menu	Primary worksheet manager who previously delegated the individuals	Manager who previously delegated the individuals	Dismiss Approve Reject	None

*Related Topics*

- [Global Setting Options for Workforce Compensation Plan Notifications](#)
- [Configure Notifications for Workforce Compensation Plan Worksheets](#)

## Header and Message Text for All Workforce Compensation Plan Notifications

Here's the header and message text for each notification for a workforce compensation plan. You can enable these notifications using the Configure Global Settings task. The notification name identifies the manager action that sends the notification.

You can't change the header and message text.

Notification	Header Text	Message Text
Budget Published	Compensation Budget Published for {manager who received the budget} ({budget amount} {currency code})	{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.
Worksheet Submitted	Approval of {plan name} for {submitting manager}	{submitting manager} submitted {plan name} worksheet for approval. Review it and take the appropriate approval action.
Worksheet Returned for Correction	Your {plan name} Worksheet is Returned for Correction	{submitting manager} returned your worksheet for correction. Review it, make the necessary changes, and resubmit for approval
Worksheet Approved by Higher Manager	Your {plan name} Worksheet is Approved	Your worksheet was approved by {approving manager}. It is still in the approval process until final approval is obtained.
Final Approval Obtained	{plan name} Worksheet is Fully Approved	Your worksheet has obtained final approval.
Plan Access Changed	{plan name} Worksheet Access Was Changed	Your access to the plan and cycle was changed.
Worksheet Withdrawn	{plan name} Worksheet was Withdrawn by {manager name}	{withdrawing manager} withdrew the {plan name} worksheet. {withdrawing manager} will resubmit the worksheet when it is ready for your approval.
Budget Withdrawn	Compensation Budget Withdrawn by {manager name}	{manager name} withdrew your budget for {plan name}. Your worksheet will display a zero available budget.
Due Date Changed	{plan name} Worksheet Due Date Changed	Your due date changed. Submit your worksheet on or before the new due date shown.
Worksheet Overridden by Higher Manager	Your {plan name} Worksheet was Modified by {manager name}	Compensation allocations for one or more of your workers was overridden by {manager name}. View details of the override from the plan worksheet.

Notification	Header Text	Message Text
Request for Information	Information Request from {manager name} Regarding {plan name}	{manager name} requested additional information about your worksheet. Review the comments and provide a response.
Eligibility Change	Eligibility Change Requested by {manager name} ({worker name})	{manager name} requested to change worker eligibility for the plan or component. Review the request and take the appropriate action
Worker Reassignments	Worker Reassignment Requested by {manager name} ({plan name})	{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
Delegate Worker Used to notify managers only	Workers Added to Your Compensation Worksheet	No predefined text.
Remove Worker Delegation Used to notify managers only	Workers Removed from Your Compensation Worksheet	No predefined text.
Delegate Worker Used when approval is required	Worker Delegation Requested by {0} ({1})	The following workers will be added to your compensation worksheet.
Remove Worker Delegation Used when approval is required	Worker Delegation Removal Requested by {0} ({1})	The following workers will be removed from your compensation worksheet.

#### Related Topics

- [Global Setting Options for Workforce Compensation Plan Notifications](#)
- [Configure Notifications for Workforce Compensation Plan Worksheets](#)

## How can I configure the content that appears in the workforce compensation submit for approval notification?

To configure worksheet summary tables, use the **Configure Worksheet Display** task. The setup determines the content in the Compensation Summary, Performance Summary, and Promotions Summary sections of the notification.

To configure the Related Links and Comments sections content, use the **Manage Task Configurations for Human Capital Management** task. You can't configure the Details and Summary sections content.

*Related Topics*

- [How Workforce Compensation Plan Notifications Work](#)
- [Header and Message Text for All Workforce Compensation Plan Notifications](#)
- [How You Define Approvals for Human Capital Management](#)



# 58 Workforce Compensation Administration Overview

## Prepare to Start a Workforce Compensation Cycle

Administering workforce compensation is an iterative process. It involves preparing for the cycle, administering individuals and workforce compensation plans during the cycle, and closing the cycle. Follow these steps to prepare for the cycle. The tasks are in **My Client Groups > Compensation** unless otherwise specified.

### Start Cycle Preparation

Step	Task
Identify new features and enhancements released since you last prepared to start a workforce compensation cycle that you want to include in this cycle.	<a href="https://docs.oracle.com &gt; Human Resources &gt; Learn What's New in Your Update">docs.oracle.com &gt; Human Resources &gt; Learn What's New in Your Update</a>
Determine what configuration changes to make to workforce compensation plans based on feedback survey results from the previous cycle.	Manager Feedback
Assess and update eligibility profiles used in the eligibility configurations for the workforce compensation plans and compensation components.	Eligibility Profiles
<p>Review existing workforce compensation plans and create additional plans for the upcoming compensation cycle, as appropriate.</p> <ul style="list-style-type: none"> <li>Create the plan cycle. Plans and cycles share compensation performance ratings and promotions according to the <b>Performance Rating Date</b> and <b>Default Promotion Effective Date</b> plan cycle dates. If you aren't planning to view and change ratings and promote individuals during the new cycle, set different dates in the new plan cycle configurations.</li> <li>Validate the hierarchies and default access levels.</li> <li>Review the corporate currency and currency switching settings.</li> <li>Validate the plan access.</li> </ul>	Workforce Compensation Plans

Step	Task
<ul style="list-style-type: none"> <li>Update feedback survey and plan information to reflect current language and policies.</li> <li>Validate the budget pools and display settings.</li> <li>Validate the enabled compensation components and make sure that the appropriate component is linked to the plan budget pool.</li> <li>Validate the performance ratings. Integration with Performance Management is common across plan cycles. This means that people use the same rating model across plan cycles and they see the most recent performance management ratings in the plan worksheets.</li> <li>Review the remaining worksheets configurations. To view current and revised configurations, use the <b>Preview</b> option whenever it's available.</li> <li>Validate your changes thoroughly and resolve any errors that might affect processing.</li> </ul>	
See how the plan and compensation component eligibility affects the plan worksheet populations.	View Administration Reports > Status and Monitoring > Worker Eligibility Details

## Administer Individuals and Plans During a Workforce Compensation Cycle

Administering workforce compensation is an iterative process. It involves preparing for the cycle, administering individuals and workforce compensation plans during the cycle, and closing the cycle. Follow these steps to administer individuals and plans during the cycle. The tasks are in **My Client Groups > Compensation**.

Step	Administration Report or Task
Validate the global models.	Global Models
Review various plan statuses and monitor plan data: <ul style="list-style-type: none"> <li>See how the plan and compensation component eligibility affects the plan worksheet populations.</li> <li>make sure that there aren't any breaks in the hierarchies for all</li> </ul>	Status and Monitoring: <ul style="list-style-type: none"> <li>Worker Eligibility Details report</li> <li>Workers Without Managers report</li> <li>Alert Summary report</li> <li>Manager Status report</li> </ul>

Step	Administration Report or Task
<p>workforce compensation plans active during the compensation cycle.</p> <ul style="list-style-type: none"> <li>Review and address alerts for all workforce compensation plans active during the compensation cycle.</li> <li>Track the progress of submitted changes through the approvals process for all workforce compensation plans active during the compensation cycle.</li> </ul>	
<p>Make sure that allocations fall within compensation policies and any defined targets for all workforce compensation plans active during the compensation cycle. This includes any defined target amounts and ranges as well as pay equity rules.</p>	Compensation Analysis reports
<p>Monitor budget pools for all workforce compensation plans active during the compensation cycle.</p>	Budget Consumption Report
<p>Review and address and performance rating and promotion issues for all workforce compensation plans active during the compensation cycle.</p>	Promotions and Performance reports
<p>Refresh workforce compensation data for all workforce compensation plans active during the compensation cycle, at the determined intervals and for the determined refresh options.</p> <p>The process updates existing worksheet data for the specified workforce compensation plan and cycle. You might need to run it if you let salary changes happen outside the workforce compensation cycle, or if the HR data had many changes.</p>	<p>Task: Run Batch Processes &gt; Refresh Workforce Compensation Data</p> <p>Supporting report: Batch Process Monitoring &gt; Refresh Workforce Compensation Data Process</p>
<p>Determine if or when to start the cycle to evaluate new assignments for a specific workforce compensation plan active during the compensation cycle.</p>	<p>Report: Batch Process Monitoring &gt; Start Compensation Cycle Process</p> <p>Supporting task: Run Batch Processes &gt; Start Workforce Compensation Cycle</p>
<p>Monitor the apply model process if you let managers create and apply models for workforce compensation plans active during the compensation cycle. Monitoring is especially important when worksheet population sizes might be larger than the configured batch limit.</p>	<p>Report: Batch Process Monitoring &gt; Apply Model Process</p> <p>Supporting task: Workforce Compensation Plans &gt; Configure Models</p>
<p>Monitor individuals who were reprocessed or added to a new plan manually, for any processing issues.</p>	Batch Process Monitoring > Reprocess or Add New Plan Data

## Close a Workforce Compensation Cycle

Administering workforce compensation is an iterative process. It involves preparing for the cycle, administering individuals and workforce compensation plans during the cycle, and closing the cycle. Follow these steps to close the cycle. The tasks are in **My Client Groups > Compensation**.

Step	Task
Confirm that all primary managers for the workforce compensation plan submitted their plan changes and the changes are approved.	View Administration Reports > Status and Monitoring > Manager Status report
<p>Release centrally managed and stored compensation change statements to managers and then individuals.</p> <p>Reduce transfer errors for changes to the workforce compensation plans by refreshing workforce compensation data before transferring changes to HR. You should also refresh data if you let salary changes happen outside the workforce compensation cycle or the HR data had many changes.</p> <p>Transfer workforce compensation data to HR. You can transfer data by compensation type, such as elements, salary, stock, performance ratings, and promotion. You can also use different HR actions with each transfer and transfer data for specific populations using inclusion criteria.</p> <p><b>Tip:</b> Changes that you make to an individual's HR data using the Administer Workers task apply to only that assignment, plan, and cycle. They don't transfer back to HR. To make the changes permanent, you need to change the data in Global Human Resources.</p>	<p>Run Batch Processes:</p> <ul style="list-style-type: none"> <li>Process Workforce Compensation Change Statements</li> <li>Refresh Workforce Compensation Data</li> <li>Transfer Workforce Compensation Data to HR</li> </ul>
Track transferred workforce compensation data and resolve any errors. To get an overall view of the processed assignments and assignments remaining to process, you can use the <b>Consolidated Posting Summary</b> report.	View Administration Reports > Data Processed reports
Close the workforce compensation cycle for each plan by setting the <b>Cycle Status</b> to <b>Closed</b> .	Active Plans

# 59 Workforce Compensation Batch Processes to Start a Compensation Cycle and Refresh Data

## Start Workforce Compensation Cycle and Synchronize Hierarchy Processes

To build the worksheets that make up the specified workforce compensation plan for the specified cycle, you run the **Start Workforce Compensation Cycle** process.

### Eligibility, Including People with Employment Termination Dates

To determine which employment records to evaluate for eligibility, the start cycle process uses these plan configurations:

- Employment records specified in the plan details
- Eligibility determination date set in the plan cycles

It then uses the eligibility criteria configured at the plan and compensation component levels to evaluate the relevant employment records and determine eligibility. To narrow the employment records used in the eligibility evaluation, set population filters, such as **Country** and **Legal Employer** when you start the cycle.

The process includes eligible people with an employment termination date between the evaluation period start date and HR data extraction dates, in the cycle. And it uses the employment termination date rather than the HR data extraction date to extract HR data. You can also include assignments terminated between plan cycle evaluation period start date and HR data extraction date that are due to a global transfer.

During the Start Compensation Cycle process, the application fetches the Current Grade Ladder and Current Grade Step values from Global HR as of the plan cycle's HR data extraction date.

### Status

For a specific plan and cycle combination, you can set the cycle to either **Administrative** or **Open** the first time you start the cycle. To change the cycle status after that, you need to use the **Active Plans** task. For example, to finalize a plan for a new focal compensation cycle, you start the cycle with **Status** set to **Administrative**. At the time designated by your policies, you use the **Active Plans** task to change the cycle status to **Open**.

### Synchronize Hierarchy

To populate the OTBI reports included in the plan configuration, you need to run the **Synchronize Hierarchy** process. You can have the start cycle process run it for you by selecting the **Launch Synchronize Hierarchy process once this process is complete** option. You can also run that process manually, for example, to populate OTBI reports with the most recent plan hierarchy data.

#### Related Topics

- [Workforce Compensation Plan Cycle Dates](#)
- [Employment Records to Use in the Compensation Cycle](#)
- [Workforce Compensation Plan Eligibility](#)
- [Overview of Reports in Workforce Compensation Plans](#)
- [Formula Type Is Compensation Person Selection](#)

## Plan Not in the Choice List of the Start Workforce Compensation Cycle Process

If you can't see the plan you're looking for in the **Plan** choice list, verify the following:

- The **Configure Plan Access** task for the plan doesn't restrict access for the **Compensation Administrator** role.
- You have the **Compensation Administrator** role or the appropriate security to run the compensation batch processes.

## Refresh Workforce Compensation Data Process

To include the most recent changes to person, HR, salary, assignment segment, and terminated worker data, run the **Refresh Workforce Compensation Data** process. Also run this process to re-evaluate eligibility and to refresh plan hierarchies, due dates, currency conversion rates, dynamic columns, alerts, and summary section totals.

### Refresh Date

You specify the date the process uses to refresh the data, calculations, and evaluations associated with the selected refresh options.

- **Actual Process Run Date:** Use the system date at the time the process runs for all refreshes, including eligibility.
- **Plan Cycle Dates:** Use the specified eligibility determination date to refresh eligibility and the specified HR data extraction date for all other refreshes.
- **Specific Date:** Use the selected date for all refreshes, including eligibility.

Predefined alerts appear according to the alert type instead of the refresh date. Also, salary metrics associated with a promotion to a new grade, such as new salary ranges and compa-ratio, use the promotion effective date. They don't use the refresh date. The **Worksheet manager does not match line manager** predefined alert is retained when you run the Refresh Workforce Compensation Data process. Make sure to use the **Refresh primary manager hierarchy** parameter when the Primary Hierarchy source in plan setup is set to something other than Primary manager hierarchy.

To run a onetime refresh, you can select any of these refresh dates. For example, you want people to use recently updated assignment segment data. You can use any refresh date to specify when to push those changes out to plan managers and other reviewers.

To schedule a recurring refresh, you probably want to use the **Actual Process Run Date** or **Play Cycle Dates** options. For example, you want people to see the most current employment changes, such as terminations and transfers, and summary totals on their worksheets. You schedule a recurring nightly refresh of HR data using the actual process run date because this becomes the system date when the process runs. Each refresh changes by 1 day every time it runs.

When you run the Refresh Process with either the Full refresh or Refresh HR data options selected, Current Grade Ladder and Current Grade Step values for workers part of the plan are refreshed from Global HR as of the effective date selected during refresh process run.

## Refresh Options

You can select one or more refresh options to process. For many options, when you select one option, you also select interconnected refreshes. For example, if you select **Refresh column defaults**, you automatically select the options to refresh dynamic columns, alerts, and worksheet summary section totals too.

**Tip:** Typically, manual primary plan manager and worker eligibility changes revert to their original values. You can use the **Administer Workers** task to identify the changes you don't want overridden.

### Related Topics

- [Workforce Compensation Plan Cycle Dates](#)
- [Employment Records to Use in the Compensation Cycle](#)
- [Workforce Compensation Plan Eligibility](#)
- [Reprocess an Individual or Add Them to a Workforce Compensation Plan and Cycle](#)
- [Formula Type Is Compensation Person Selection](#)

# Refresh Options for the Refresh Workforce Compensation Data Process

Here's a comprehensive list of the refresh options you can select when you run the **Refresh Workforce Compensation Data** process. Because of the interconnectedness of workforce compensation plan objects and worksheet columns, frequently selecting one option also selects other options.

Option	Description
Full refresh	When you select this option, you also select all other refresh options except the last few. You don't refresh active plan data, currency conversion rates, or terminated worker data using the process date. You do refresh everything else.
Refresh HR data	Refresh all person and HR-related data, except the primary plan manager. Refresh the summary section totals of the plan worksheets and the predefined alerts. Also refresh all alerts and dynamic worksheet columns with the <b>Refresh Data</b> triggering event selected.
Refresh base and eligible Salary	Refresh base salary, salary basis, salary range columns, and any related data stored in the workforce compensation tables. This stored data includes base salary frequency, adjusted salary, FTE salary, and compa-ratio. Refresh default values for eligible salary and local currency if using input currency, the summary section totals of the plan worksheets, and the predefined alerts.

Option	Description
	Also refresh all alerts and dynamic worksheet columns with the <b>Refresh Data</b> triggering event selected.
Refresh column defaults	Refresh column defaults for the plan worksheets, the summary section totals of the plan worksheets, and the predefined alerts. Also refresh all alerts and dynamic worksheet columns with the <b>Refresh Data</b> triggering event selected.  Recalculate eligible salary derived using a formula or dynamic column. Don't override existing column values that aren't from HR and don't have a column default or dynamic calculation defined.
Refresh assignment segments data	Refresh the external data used to configure the assignment segments. Also refresh the dynamic worksheet columns with <b>Default value subject to refresh</b> selected.
Refresh primary manager hierarchy	Refresh the primary plan manager and rebuild the corresponding hierarchy. Also refresh the summary section totals of the plan worksheets and the predefined alerts
Refresh secondary manager hierarchy	Refresh the secondary plan manager and rebuild the corresponding hierarchy. Also refresh the predefined alerts.
Refresh other reviewer hierarchy	Refresh the other reviewers and rebuild the corresponding hierarchy. Also refresh the predefined alerts.
Reevaluate eligibility	Re-evaluate the plan-level and component-level eligibility of everyone already included in the plan, which if you track ineligible people, might change their eligibility status. Also refresh the summary section totals of the plan worksheets, and all alerts and dynamic worksheet columns with the <b>Refresh Data</b> triggering event selected.  If you don't track ineligible people and want to add eligible people to the plan, use the <b>Start Workforce Compensation Cycle</b> process.
Reevaluate assignment segment eligibility	Re-evaluate people's eligibility for the assignment segment. Also refresh the dynamic worksheet columns with <b>Default value subject to refresh</b> selected.
Reevaluate limited eligibility	Re-evaluate which plan managers have a status of <b>Limited</b> . Refresh the summary section totals of the plan worksheets, the predefined alerts, and all alerts with the <b>Refresh Data</b> triggering event selected. Also refresh the dynamic worksheet columns with <b>Default value subject to refresh</b> selected or the <b>Refresh Data</b> triggering event selected.
Refresh due dates	Refreshes due dates set in the plan cycle configuration, including the hierarchy due dates.
Refresh dynamic columns for assignment segments	Refresh the dynamic worksheet columns for assignment segments with <b>Default value subject to refresh</b> selected.
Refresh dynamic columns and alerts	Refresh the summary section totals of the plan worksheets and all alerts and dynamic worksheet columns with the <b>Refresh Data</b> triggering event selected.
Refresh predefined alerts	Refresh the predefined alerts.
Refresh summary totals	Refresh the period totals in the summary section of the plan worksheets. The refresh includes the total count and eligible counts for all managers and their direct reports.
Refresh terminated worker data using process date	Refresh terminated people's HR data using the batch process date.
Refresh active plan data	Refresh the compensation components and component post as salary option. Also refresh the configuration data of the budget pool for the plan and period. Budget pool data includes status, budgeting style, submit mode, and approval mode.
Refresh currency conversion rates	Refresh the conversion rate data for the plan and period as of the refresh date.



Option	Description
Lock worksheet while the process runs	Prevents people from changing their worksheets and possibly introducing data corruptions, while their worksheets are getting refreshed. If you submit the refresh process without this option selected, people can make changes during the refresh.

#### Related Topics

- [Guidelines to Configure Default Values for the Promotion Effective Date Column](#)
- [Option to Track People Ineligible for a Workforce Compensation Plan](#)
- [How the Options to Track and Hide Ineligible People Affect Plan Worksheets](#)
- [Workforce Compensation Plan Eligibility](#)
- [Eligibility Profiles of Compensation Components](#)

## Formula Type Is Compensation Person Selection

To determine the person selected for an associated workforce compensation plan, you can create formulas using the Compensation Person Selection formula type. You select the formula when you run these batch processes:

- Start Workforce Compensation Cycle
- Refresh Workforce Compensation Data
- Transfer Workforce Compensation Data to HR

Here's a comprehensive list of the contexts available to this type of formula:

- 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

The database items available for this type of formula are related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates.

These are the input variables available to this type of formula:

Input Value	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End 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
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERSON_ID	Number	Y	Worker ID

These are the return variables available to this type of formula:

Return Value	Data Type	Required	Description
L_SELECTED	Char	N	Y or N

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)
/*===== 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 =====*/

```

*Related Topics*

- [Formula Compilation Errors](#)
- [Formula Execution Errors](#)
- [When do I run the Compile Formula process?](#)
- [Example of Writing a Fast Formula Using Formula Text](#)



# 60 Workforce Compensation Batch Process to Transfer Workforce Compensation Data

## Transfer Workforce Compensation Data to HR Process

To post base pay adjustments to salary records and element entries to payroll, use the **Transfer Workforce Compensation Data to HR** process. Also use this process to post stock grants to stock history and job, grade, and position changes to the assignment records specified in the plan. Depending on the plan worksheet configurations, some of the transfer details pages might not have any data to transfer.

- To transfer all data, select and configure all relevant element, salary, stock, and promotion details.
- To transfer specific data, configure those details and unselect the details on all other pages except Other Details. For example, to transfer just stock grants, configure the stock details and unselect all element, salary, and promotion details.

You need to post the same types of details for a person, in the same transfer process. For example, post all of Lynn's element details in a single transfer. You can't post some of their element details with one transfer process and the post more element details with a later transfer process. You can post all of their element details with one transfer process and then post all of their stock details with a later transfer process.

When you run the Transfer Workforce Compensation Data to HR process the process transfers the Proposed Grade Step attribute along with existing Job, Grade, Position, and Assignment Name Change attributes of a person's assignment. The Transfer process skips salary transfers for those workers who are on a Grade Ladder of Type Grade and Steps and the Grade Ladder has Include salary updates checked. The Transfer process log shows the reason an update was skipped. After a Proposed Grade Step is transferred to an assignment from a plan cycle, the Rate Synchronization process needs to run separately to update the new salary on the assignment because the Transfer process doesn't update the salaries.

## View Statistics

You can better understand the raw data related to the plan, cycle, and action you're transferring data for by expanding the View Statistics section. You can see the total, eligible, processed, partially processed, and unprocessed assignments included in the transfer process configuration. You can also see how many assignments are marked to not process and processed assignments for salary, stock, promotion, and elements column.

## People Whose Employment Was Terminated

To post single compensation payments and salary adjustments for people whose employment was terminated, run the **Transfer Workforce Compensation Data to HR** process when the compensation cycle is over. Make sure that the plan cycle is still open though. The effective date of the compensation allocations must be before or on the person's employment termination date. The transfer process fails to post any payments and adjustments with an effective date after the person's payroll last standard process date.

## Element and Salary Details of Transfer Workforce Compensation Data to HR Process

The salary and element mapping property configurations of the compensation amount columns determine where the **Transfer Workforce Compensation Data to HR** process posts the data. The configurations also determine the step where you configure the transfer details.

If **Post as Salary** is **No**, the changes post to the element entry of the specified payroll element. You include or exclude this data in the transfer using the Element Details page. If none of the compensation amount columns in the plan have this property configuration, then the Element Details page of the transfer process is blank.

If **Post as Salary** is **Yes**, the changes update people's salary records. If the column also has a salary component specified, such as **Merit** or **Cost of Living**, the salary changes include that component for future reference. If none of the compensation amount columns in the plan have this property configuration, then the Salary Details page of the transfer process is blank.

Given that plans can have up to five compensation amount columns, the transfer might have all amounts post to either elements or salary records. Or the transfer might have some amounts post to elements and others to salary records.

### *Related Topics*

- [Salary and Element Mapping Properties of Compensation Amount Columns](#)
- [Other Details of Transfer Workforce Compensation Data to HR Process](#)
- [Transfer Workforce Compensation Data to HR Process](#)

## Stock Details of Transfer Workforce Compensation Data to HR Process

To post stock granted in workforce compensation plans to people's stock history, configure the stock details of the **Transfer Workforce Compensation Data to HR** process. People can see their stock history in the Shares section of their Compensation page. Depending on change statement configurations for the plan, they might also be able to see the history in their workforce compensation change statement.

You don't have to set up payroll elements to post stock grants.

### *Related Topics*

- [Transfer Workforce Compensation Data to HR Process](#)
- [Other Details of Transfer Workforce Compensation Data to HR Process](#)

## Promotion Details of Transfer Workforce Compensation Data to HR Process

To post changes to people's jobs, grades, and positions, you configure the promotion details of the **Transfer Workforce Compensation Data to HR** process. If the promotion includes compensation changes, you configure that part of the data transfer on either the Element Details or Salary Details page, or both.

To mark people's compensation changes as part of a promotion, post promotion data in a separate transfer process with the **Promotion** action reason. You still configure any related element and salary details separately from the promotion details.

### *Related Topics*

- [Element and Salary Details of Transfer Workforce Compensation Data to HR Process](#)
- [Salary and Element Mapping Properties of Compensation Amount Columns](#)
- [Other Details of Transfer Workforce Compensation Data to HR Process](#)
- [Transfer Workforce Compensation Data to HR Process](#)

## Other Details of Transfer Workforce Compensation Data to HR Process

To filter the people whose data you want to transfer to HR, configure the other details of the **Transfer Workforce Compensation Data to HR** process. For example, you can specify to include only the subordinates of specific managers and build a condition that identifies inclusion criteria to apply. You can also use a person selection formula and include people who's changes were approved to a specific level.

**Tip:** The statistics you can view contain only the people included using the manager hierarchy and worker inclusion criteria. The statistics don't contain people included using the person selection formula or people with changes approved to the specified level.

### Workers Approved at Least N Levels Up

To include people's changes in the transfer process, the changes need to be part of **Approved** plans in the specified levels. For example, if you select **1**, the transfer process includes the approved plan changes from the lowest level of the plan hierarchy.

If you select **3**, the transfer process includes the approved plan changes from the three lowest levels of the plan hierarchy. If plan changes for the third level up are **In Approvals**, the transfer process includes only the approved changes for the first two levels. It excludes the changes for the third level because they're pending approval.

## Mark Assignments as Processed

Every time you run the transfer process, you need to specify whether to mark assignments as processed.

- **No:** When the process successfully posts the assignments, it process marks them as partially processed. This option lets a future transfer process post changes for other unprocessed details. For example, you transfer only stock details in a process that doesn't mark assignment as processed. Later, for the same people, you transfer salary and promotion details.
- **Yes:** When the process successfully posts the assignments, it marks them as fully processed. To process any further changes, you need to run the **Back Out Workforce Compensation Data** process, for the appropriate transfer process ID. You can find that process ID in various reports available using the **View Administration Reports**.

### *Related Topics*

- [Basic and Advanced Tabs When Building a Condition for a Dynamic Column or an Alert](#)
- [Configure Approvals for Workforce Compensation Plan Worksheets](#)
- [Alternate Approver Table in Worksheet Approval Configuration](#)
- [Transfer Workforce Compensation Data to HR Process](#)
- [Formula Type Is Compensation Person Selection](#)



# 61 Workforce Compensation Batch Processes to Back Out and Purge Data, Notify Managers, and Process Change Statement

## Back Out and Purge Workforce Compensation Data Processes

To reverse the transfer of data from the workforce compensation plan to HR, you run the **Back Out Workforce Compensation Data** process. For example, you run the process to remove transferred element and salary data so that you can transfer newer changes for processing. When you run the process, you can do a full back out to reverse all of data transfers for the specified plan and cycle. You also do a full back out to reverse all plan hierarchy synchronizations. Or you can reverse the data transferred by a specific process. Various administrative reports that you access using the **View Administrative Reports** task include process IDs for just this purpose. To honor the work that plan managers put into creating models, you can specify that the back out process preserve any plan models.

To remove unneeded data from previous cycles for the specified plan, you run the **Purge Workforce Compensation Data** process. You can select a specific plan and cycle. Or you can provide an HR data extraction date range. The process purges the data from all plans with HR data extraction dates on or during the process start and end dates. After you set the range, the process tells you how many cycles it will purge.

The Back Out Workforce Compensation Cycle process reverts any Grade Step changes that are done as a part of Transfer Workforce Compensation Data to HR process.

### Related Topics

- [Transfer Workforce Compensation Data to HR Process](#)

## Notify Managers About Workforce Compensation Plan Due Dates and Cycle Status Change Processes

To remind primary plan managers of upcoming due dates, you run the **Notify Managers of Approaching Due Dates** process. You can notify them that due dates are approaching in 15, 10, 5, 4, 3, and 2 days as well as tomorrow and today. You can also notify them that a due date is past. When you configure the notification process, you select a specific due date or multiple due dates, as appropriate to your policies.

To let primary plan managers know that the plan cycle is open or closed, run the **Notify Managers That Cycle Is Open or Closed** process. When you configure the process, you can optionally specify when to communicate plan changes to affected individuals. You can also refine the people affected by the cycle status change using population filters, such as to meet country-specific regulatory requirements. For example, you configure an instance of the process to notify only managers in France that the plan cycle is closed for people in France. And you configure another instance of the process to notify only managers in Germany that the plan cycle is closed for people in Germany.

*Related Topics*

- [Workforce Compensation Plan Cycle Dates](#)
- [Overview of Plan Validation and Starting the Workforce Compensation Cycle](#)
- [Start Workforce Compensation Cycle and Synchronize Hierarchy Processes](#)

## Process Workforce Compensation Change Statements Process

To generate and store the compensation change statements configured for central management, you run the Process Workforce Compensation Change Statements process.

For the specified combination of workforce compensation plan and cycle, you specify the mode of the process, such as **Delete**, **Update Expiration**, or **Replace**. You need to specify visibility, such as only administrators; administrators and managers; or administrators, managers, and workers for the **Update Visibility**, **Replace**, and **New** modes. And for all modes, you need to specify the change statement template the process uses when it runs.

You can also refine the people to generate the compensation change statements for using population filters, such as to meet country-specific regulatory requirements. For example, you configure an instance of the process to generate statements for only people in France. And you configure another instance of the process to generate statements for only people in Germany.

*Related Topics*

- [Overview of Compensation Change Statements in Workforce Compensation Plan Worksheets](#)
- [Statement Generation Timing and Output Format for Compensation Change Statements](#)
- [Delivery Options for Compensation Change Statements](#)

## People Can't See Their Workforce Compensation Change Statements

To let people see their workforce compensation change statements, review and change these settings, as appropriate:

- Enable worker statements using the **Configure Global Settings** task.
- Make the expiration date of the **Process Workforce Compensation Change Statements** process after the process date. Also set **Visibility** to **Administrators, managers and workers**.

# 62 View Compensation Administration Reports

## Compensation and Budget Analysis Reports for Workforce Compensation

Here's a list of reports that analyze compensation and budgets.

### ***Compensation and Budget Analysis Reports***

Report	How to Use
Compensation Allocations	Review allocations by component. The summary shows allocations by Legal Employer. The details are by person.
Allocations Deviating From Target	Review allocations compared to targets, and percentage deviations from targets. Validate that allocations line up with set targets. Percentage deviation refers to the difference between the Percentage of Eligible Salary and the Target Compensation Percentage, expressed as a percentage of eligible salary.
Allocations Compared to Target Ranges	See amount and percentage of eligible salary allocated, and where awards fall within target ranges. Validate that allocations are within set compensation target ranges.
Budget Consumption	<p>See manager allocations compared to published budgets. Review how managers use their budgets. If you use worker-level budgets, you can see the breakout by country by manager.</p> <p>You can view worker-level budget amounts by country in the Budget Consumption report in View Administration Reports. Click the icon in the Budget Usage by County column to see a window with the amounts listed by country. When you use manager-level budgets, only compensation amounts are listed by country.</p>

### *Related Topics*

- [Cycle Overview Reports for Workforce Compensation Managers](#)
- [Salary Analysis Reports for Workforce Compensation Managers](#)
- [Target Analysis Reports for Workforce Compensation Managers](#)
- [Distribution Analysis: Allocations by Manager Report for Workforce Compensation Managers](#)

## Promotions and Performance Reports for Workforce Compensation

Here's a list of reports that summarize performance info.

## Promotions and Performance Reports

Reports	How to Use
Promotion Summary	See all job, grade, and position changes made during a compensation cycle. Review all promotions. The summary shows changes by grade, job or position.
Performance Rating Summary	See deviations from profile rating model targets for each performance rating. Review performance ratings against the rating profile distribution in the summary.  Review all ratings for all workers in the details. Use the "No Rating" option to find workers without a rating.

### Related Topics

- [Pay for Performance Reports for Workforce Compensation Managers](#)

# Status and Monitoring Reports for Workforce Compensation

Here's a list of reports that show various compensation statuses.

Report	How to Use
Manager Status	See where managers are in the compensation plan's cycle. Identify which managers haven't started their work.
Alert Summary	View all alerts triggered for all workers in this compensation cycle. The summary shows the breakout of alerts by type. The details allow you to refine the list of people by alert type.
Manager Feedback	Review the feedback that managers gave after they submitted their plan changes for a given plan cycle. The report is separated by rating summary, rating details, and then the responses to any configured questions.
Workers Without Managers	Review workers without a worksheet manager that create a gap in the reporting hierarchy. Validate that there're no gaps in the primary hierarchy.
Worker Eligibility Details	Review plan and component level eligibility details of the workers in a compensation cycle. Review how eligibility configuration has affected the plan population. The summary shows 2 graphs: plan eligibility and component eligibility. You can switch between components to review any other configured component level eligibility impacts.  The details lets you refine the list of ineligible people by plan or component ineligibility reason. You can also see which eligibility profile and criteria caused a person to be found ineligible for the component or plan.
Worker Statement Actions	Review the actions taken by people on their stored compensation change statements. If no one has taken an action, you're notified of the same and the report does not run.  You can view the status of the actions taken by workers on their compensation change statements in employee self-service. To use the report, you must configure the workforce compensation plan to use the centrally managed and stored option for statements and run the Process Workforce Compensation Statements process.

## Data Processed Reports for Workforce Compensation

Here's a list of reports that show processing info.

### Data Processed Reports

Report	How to Use
Salary Adjustments Posted	<p>See processing details and total salaries adjusted. Review posted salary adjustments. The summary shows the adjustments by Legal Employer and Salary Basis. The details shows them by person.</p> <p>The report generates a batch process ID. You can back out by the ID if there are problems.</p> <p>You can view amounts in the Salary Adjustments Posted report in the same decimal precision as in the worksheet.</p>
Element Entries Posted	<p>Review total allocations posted element entries. The summary shows the adjustments by Legal Employer and payroll element. The details shows them by person.</p> <p>The report generates a batch process ID. You can back out by the ID if there are problems.</p>
Assignment Changes Posted	<p>See job, grade and position changes transferred to core HR by assignment. Review posted assignment changes. The summary shows info by Legal Employer and number of changes. The details shows the changes by person.</p> <p>The report generates a batch process ID. You can back out by the ID if there are problems.</p>
Stock Grants Posted	<p>Review stock grants posted to the Stock table. The summary shows stock posted by Legal Employer and Grant Type. The details shows info by person.</p> <p>The report generates a batch process ID. You can back out by the ID if there are problems.</p>
Posting Error Summary	<p>See cycle close errors that may require manual processing. Review posting errors by batch process ID. The summary shows overall errors by type and the number. The details shows which people had the error.</p>
Consolidated Posting Summary	<p>See an overall view of all posted data. The summary graph shows the number of assignments, number of eligible assignments, how many are fully process or partially processed, how many are pending processing and how many assignments were marked to not process. The details shows what was posted for each batch process ID.</p>
Back Out Cycle Error Summary	<p>See all errors that occurred when backing out data that were transferred to HR. The report is separated by batch process ID.</p>

## Consolidated Posting Summary Report Data

This report in the Compensation work area, Administrative Reports task lets you see an overall view of all posted data.

Within the report, you are able to see the following for each batch run:

- Process ID
- Run Mode

- Run Start Time
- Who submitted the batch process
- If unhidden, you can see if assignments were marked as "Processed"

For each allocation type (element, promotion, salary, stock) within the batches the following is available:

- How many were posted
- How many failed
- How many were backed out
- How many had no action taken

This report displays only overall data processed and if assignments are still marked to allow for more processing. You need to review the Posting Error Summary report to find out why data transfers fail.

## Exports for Workforce Compensation

Here's a list of reports you can use to export info by parameters you select.

Report	How You Use
Worksheet Export	See worksheet details exported to a workbook. Export worksheet data using the following parameters: Name, Country, Legal Employer, Business Unit, Department, and Manager Hierarchy.
Generate Real Time Statements	<p>Generate statements for a selected manager hierarchy. After you select a manager hierarchy, you can further refine the population by country. Generate statements all at once for a selected template. This export doesn't take into account any statement criteria in plan setup. It uses criteria within the template.</p> <p>Generated files are only available for the time shown on the page. The system currently sets the availability to 7 days.</p>
Audit Export	<p>Use the following parameters to view and export audit trail data to a workbook from a plan cycle: Person Name, Column Updated, Updated By, Component, Last Update Date, Department, Business Unit, Legal Employer, Country, and Manager Hierarchy. The Advanced option lets you search by Update Date Range instead of Last Update Date.</p> <p>You must enable the "Include in audit trail" column property before you run the Start process. This is the same as with the Audit report on the worksheet.</p>

## Batch Process Monitoring for Workforce Compensation

Here's a list of reports you can use to monitor workforce compensation processing.

Report	How to Use
Start Compensation Cycle Process	See history of Start Workforce Compensation Cycle batch process submissions. Use this report to see these details:

Report	How to Use
	<ul style="list-style-type: none"><li>• Efficiency of the start process ran based on plan setup details and selected parameters.</li><li>• Number of workers processed and the time taken.</li><li>• Number of fast formulas used in plan setup and access additional info.</li></ul> <p>If you enable the start compensation cycle trigger during setup, you can also see how many dynamic calculations are configured.</p>
Refresh Workforce Compensation Data Process	<p>See history of Refresh Workforce Compensation Data batch process submissions. Use this report to see these details:</p> <ul style="list-style-type: none"><li>• Efficiency of the refresh process ran based on plan setup details and selected parameters.</li><li>• Number of workers processed and the time taken.</li><li>• Number of fast formulas used in plan setup and access additional info.</li></ul> <p>If you enable the refresh data trigger during setup, you can also see how many dynamic calculations are configured.</p>
Reprocess or Add New Plan Data	<p>See history of Reprocess or Add New Plan batch process submissions. Administrators can see details from the Reprocess or Add New Plan Data process. It shows info about the submission itself and if any errors occurred.</p>
Apply Model Process	<p>See history about the Apply Model Process including any submissions done by worksheet managers. Administrators use this report when people have difficulty applying a model through the batch process.</p>

## Discrimination Detection Report

You can analyze classes of people who are protected from pay discrimination using the Discrimination Detection report. For example, you can compare compensation for men and women who work in the US.

The report calculates the averages and medians using standard statistical methods.

### Summary

You can view calculated values for the entire plan cycle in the Cycle Summary section. By default, the report shows everyone for the entire cycle. But, you can limit the people you're comparing using criteria in the Define Comparison Group section.

You can refine the report in the Protected Class Analysis section to show only people in the comparison group who belong to protected classes, such as gender and age. Most of the values in the table are self-evident. But, the Amount Difference, under the **Variance from Group Average** header, is calculated as follows: Class Average Amount - Group Average Amount.

The class amount is in the table, under the **Compensation for this Group** header. The group amount is in the Cycle Summary section.

### Details

Here's the source of some of the data in the table on the Details tab.

Field	Data Source
Discrimination Reporting Code	HR tables
Group Median Amount	Same value as the field in the Cycle Summary section of the Summary tab. It's the same for everyone. You can use it as a reference to compare with the person's Compensation Amount.
Difference from Group	A result of this calculation: Compensation Amount - Group Median Amount.



# 63 Active Workforce Compensation Plans and Manual Currency Conversion Rates

## Active Workforce Compensation Plans

To see the active workforce compensation plans and the status of their plan cycles, use the **Active Plans** task in the Compensation work area. You can also use this task to make these changes for a specific plan cycle:

- Cycle status
- Approval, submit, and withdraw modes
- Plan, component, and budget pool display order
- Currency conversion rates

The changes you make with this task don't apply to the source plan configuration.

## Currency Conversion Rates

Plan worksheets can show converted currency amounts and the currency conversion rates. They also use the rates to calculate the amounts in the **Budget Amount - Worker** column. And the **Transfer Workforce Compensation Data to HR** process posts amounts in each person's local currency. Thus, the plan cycle has to include currency conversion rates. If you don't populate the rates using the **Manage Daily Rates** task, you can manually add them on the plan cycle Active Plans page.

When you first run the **Start Workforce Compensation Cycle** process for the plan cycle, the process populates the appropriate workforce compensation table. It loads the daily rates in effect at that date and time. Here's how you can update the table and plan cycle worksheets with the most recent daily rates:

1. On the Active Plan page, Currency Conversion Rates tab, click the **Refresh** button. To update the table with manually added and changed currency conversion rates, save the changes you made on the tab.
2. Run the **Refresh Workforce Compensation Data** process with the **Refresh summary totals** option selected to update the plan cycle worksheets with the most recent rates.

### Related Topics

- [Add and Change Currency Conversion Rates for a Workforce Compensation Plan Cycle](#)
- [Guidelines for Creating Conversion Rate Types](#)
- [Overview of GL Currency Rates Upload](#)

## Add and Change Currency Conversion Rates for a Workforce Compensation Plan Cycle

All compensation areas, such as salary, individual and workforce compensation, and total compensation, convert values using general ledger daily rates. More specifically, the selected plan cycle uses these daily rates to convert the plan

currency to people's local currencies in the enabled worksheets. Here's how you can manually manage specific currency conversion rates for the plan cycle, as needed:

1. On the plan cycle Active Plans page, Currency Conversion Rates tab, add a row. To change an existing rate, skip to step 3.
2. Select the **To Currency** code, such as **CAD - Canadian Dollar**.
3. Enter the conversion rate, such as **1.00695**.
4. Repeat steps 1 -- 3 to add other currencies. Repeat step 3 to change other conversion rates.
5. When you finish, save your changes.
6. Refresh the summary data in the plan cycle worksheets with these changes.
  - a. On the Run Batch Processes page, in the **Refresh Workforce Compensation Data** row, click the **Run** icon.
  - b. Select the appropriate plan, cycle, and refresh date.
  - c. Optionally select a person selection formula.
  - d. Select the **Refresh summary totals** option.

# 64 Administer Workforce Compensation for Workers

## Administer Individuals During Workforce Compensation Cycles

To reprocess the data used in workforce compensation for a specific person or add them to a new plan, you use the **Administer Workers** task. The changes that you can make depend on the person's HR data, plan configuration, and whether the person is a manager. Here's what else you can do with the task:

All of the information that you see and the changes you make apply only to the selected person, assignment, workforce compensation plan, and plan cycle. They don't apply for anyone else. They also don't apply for the same person in these situations:

- Review the person's information, such as employment details and any employment terminations.
- Review and change details about the person's budget, compensation, promotion, performance, hierarchies and statuses, and eligibility. You can also review and change user-defined data, notes, alerts, and audit history.
- Review any generated statements or stored statements, and add stored statements.

**Tip:** To keep any changes you make for the specific person, assignment, plan, and cycle, you can select the Exclude worker from the refresh process option. This option is above the Person Information section of the Administer Workers page with the various tabs, starting with Worker Information and Budget. The refresh processes preserve any changes until you unselect the option.

### Related Topics

- [Refresh Workforce Compensation Data Process](#)

## Reprocess an Individual or Add Them to a Workforce Compensation Plan and Cycle

You can reprocess the data for a specific person, assignment, and effective date used in a specific workforce compensation plan and cycle. For example, someone transferred into or out of your organization after the workforce compensation cycle starts. Now, you want to re-evaluate their eligibility for a specific plan and cycle with an effective date that's the day the transfer was finalized.

1. Use the **Administer Workers** task to search for the person and get a list of their assignments.
2. In the row with the appropriate assignment, click the person's name.
3. On the Administer Workers: Select Plan page, use the **Reprocess or Add New Plan** button to complete any of these tasks:
  - Re-evaluate the person's eligibility for a plan and cycle they're already participating in.

- Evaluate their eligibility for a plan they're already participating in, but a cycle they aren't.
- Evaluate their eligibility for a plan and cycle they aren't participating in.

#### Related Topics

- [Refresh Workforce Compensation Data Process](#)

## Administer an Individual's Hierarchies and Access for a Workforce Compensation Plan Cycle

Manager and reviewer responsibilities during a workforce compensation cycle depend on the plan hierarchy and access settings.

- Primary managers finalize and approve workforce compensation plan changes submitted by their subordinate managers. They also finalize their own changes and then submit all of these changes to their approver.
- Secondary managers and other reviewers view plans delegated by the primary manager. Depending on the setup, they can suggest changes to the primary manager. The delegated individuals they review might appear in a different reporting structure than they do in the primary hierarchy.

Sometimes you might need to change the manager or reviewer. For example, the current primary manager is the new line manager for the person as the result of a recent internal transfer. You want the primary manager for this assignment, plan, and cycle to be their previous line manager because that manager knows this person better. Any hierarchy changes don't change the line manager for the assignment.

As needed, you can override the access levels configured for these hierarchies. For example, you want to remove all access for the primary manager. And you do want to give the secondary manager access and let them make changes.

You can change the plan hierarchies and access on the Administer Workers page, Status and Hierarchy tab. The changes apply only for the selected person, assignment, workforce compensation plan, and plan cycle.

**Tip:** To keep any changes you make for the specific person, assignment, plan, and cycle, you can select the **Exclude worker from the refresh process** option. This option is above the Person Information section of the Administer Workers page with the various tabs, starting with Worker Information and Budget. Future reprocess and refresh processes preserve any changes until you unselect the option. You can also use the **Don't refresh** option for each relevant hierarchy to let future reprocess and refresh processes update other changes you made.

#### Related Topics

- [Workforce Compensation Plan Hierarchies](#)
- [Options to Configure Workforce Compensation Plan Hierarchies](#)

## Administer an Individual's Manager and Processing Statuses, and Due Date for a Workforce Compensation Plan Cycle

When you administer an individual, you can administer them and an assignment as being part of a primary manager's plan worksheets for the cycle. You might also administer them in such a way for a secondary manager or other reviewer. And for those individuals who are also a primary manager for the workforce compensation plan and cycle, you can administer their plan and approval statuses.

To change the status for their plan, you use the **Manager Status** field. To see what work the individual has finished so far in their role as primary manager, you can review their action history. You can also change the due date by when they need to submit their plan changes for approval.

Again administering the individual as part of a primary manager's plan worksheets, you can also review and change their processing status. The status indicates how much of the plan changes to the individual's workforce compensation data were transferred to HR.

To review the current statuses and due date, and make any necessary changes, use the Administer Workers page, Status and Hierarchy tab.

## Administer an Individual's Eligibility for a Specific Workforce Compensation Plan Cycle

When the **Start Workforce Compensation Cycle** process runs, it determines people's eligibility status for the workforce compensation plan and enabled compensation components. Depending on the refresh and population options you select, the **Refresh Workforce Compensation Data** process re-evaluates their eligibility status. It's also re-evaluated for an individual when you **Reprocess or Add New Plan** for them.

You can manually override the eligibility status for a specific person, assignment, plan, and cycle using the **Administer Workers** task. On the Eligibility tab of the Administer Workers page, you can set the eligibility status for the plan or for specific components. You can also specify that future reprocess and refresh processes can't update your changes.

When administrators run the Reprocess or Add New Plan process, the application fetches the Current Grade Ladder and Current Grade Step values from Global HR as of effective date selected during the process run. When you run the Refresh Data process for any person, the Current Grade Ladder and Current Grade Step values are also refreshed.

### *Related Topics*

- [Workforce Compensation Plan Eligibility](#)
- [How Required and Optional Profiles Determine Compensation Eligibility](#)
- [Option to Track People Ineligible for a Workforce Compensation Plan](#)
- [How the Options to Track and Hide Ineligible People Affect Plan Worksheets](#)
- [Eligibility Profiles of Compensation Components](#)



# 65 Examples of When to Reprocess an Individual after Starting a Workforce Compensation Plan Cycle

## Someone Transfers into an Organization After the Workforce Compensation Cycle Starts

Maria transfers into your organization after the workforce compensation cycle starts and may be eligible for compensation changes.

You use the **Administer Workers** task to find the appropriate assignment. And you use the **Reprocess or Add New Plan** button to evaluate her eligibility for the specified plan and cycle. If the process finds Maria eligible, it adds her to the appropriate primary plan managers' worksheets.

## Someone's Data Is Corrected in HR After the Workforce Compensation Cycle Starts

Michael was ineligible for a workforce compensation plan and cycle because of incorrect employment data.

After HR corrects the data, you use the **Administer Workers** task to find the appropriate assignment. And you use the **Reprocess or Add New Plan** button to re-evaluate his eligibility for the specified plan and cycle. If the process finds Michael eligible based on the corrected data, it adds him to the appropriate primary plan managers' worksheets.

## Someone Leaves an Organization After the Workforce Compensation Cycle Starts

Janice is eligible for a workforce compensation plan when the cycle starts. A week later, she leaves your organization making her no longer eligible for compensation changes in that plan and cycle.

You use the **Administer Workers** task to find the appropriate assignment. And you use the **Reprocess or Add New Plan** button to re-evaluate her eligibility for the specified plan and cycle. The process finds her ineligible because she isn't in the organization anymore, and removes Janice from her primary plan managers' worksheets.

## A Contingent Worker Becomes a Regular Worker After the Workforce Compensation Cycle Starts

Ravi, a contingent worker, isn't eligible for compensation changes when the cycle starts for a specific workforce compensation plan. But Ravi manages people who are eligible. Thus his status in the plan worksheets is **Limited** and he can only propose compensation changes for his subordinates and approve subordinate managers' plan changes. A few weeks later, Ravi becomes a regular worker and should now be eligible for compensation changes.

You use the **Administer Workers** task to find the appropriate assignment. And you use the **Reprocess or Add New Plan** button to re-evaluate his eligibility for the specified plan and cycle. If the process finds him eligible, it changes Ravi's status to **Eligible** in the appropriate primary plan managers' worksheets.



# 66 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 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.

You can also share statement definitions across environments or with your colleagues by using the Export XML and Import XML actions. When you import you'll have objects that are in progress. If you share statement definitions with colleagues, then your sources will be different. Categories and subcategories display partially completed icons. You need to complete any unfinished items or categories. Then, generate statements using the newly imported Statement Definition.

### 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.

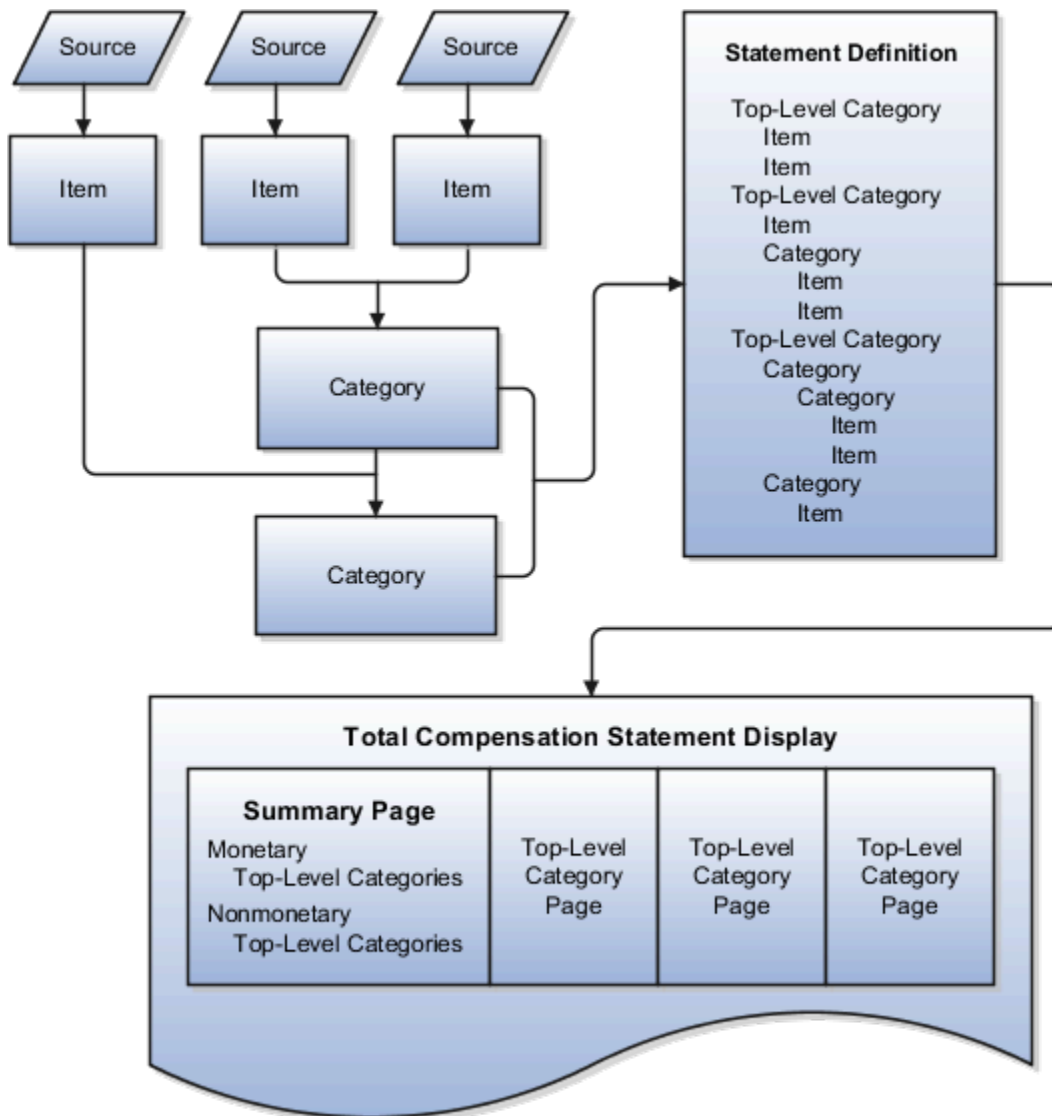
## Iterative Design Process

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.

# Overview of Creating 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 by selected population filters, including manager hierarchy, for review by compensation manager.

6. Monitor process logs.
7. Make statements available for workers to view.
8. Purge unneeded statements and monitor processes with summary and detailed online reports.
9. Enable feedback and configure ratings and questions. Feedback lets you gauge employee satisfaction with total compensation thereby improving the total compensation package.

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](#)
- [Guidelines to Create Total Compensation Statement Definitions](#)
- [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.

Display Option	Category Setup	Statement Definition Setup
Hide table columns	Yes	Yes: summary page columns
Rename table columns	Yes	Yes: top-level categories only
Configure display of zero or no values	Yes	Yes: top-level categories only
Configure graph display	Yes	Yes: in summary page
Add descriptive text	Yes	Yes: in summary page

Display Option	Category Setup	Statement Definition Setup
Add supplemental text	Yes	Yes: in summary page
Change vertical display order	Yes	Yes: in summary page
Hide regions for graphs or descriptions	Yes	Yes: in summary page
Exclude category from statement summary	No	Yes: top-level categories only
Hide or show estimated amount indicator	No	Yes
Include and hide statement summary page	No	Yes
Include and hide welcome message	No	Yes
Select printable statement options	No	Yes
Display job or position, or both, in the statement header	Yes	Yes: in statement options

#### 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](#)

## 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.

Statement Element	Display Options When All Contribution Values are Zero or No Value
Top-level categories page	<p>Do not display category if zero values or no values exist</p> <p>Display category if values are zero; hide if no value exists</p> <p>Always display the category page</p>
Stock subcategory rows	<p>Do not display row when no values exist or values are zeroes</p> <p>Display row if values are zeroes and allow subcategory drill</p> <p>Display and allow drill if historical values are over zero</p> <p>Always display the row and prevent drilling to subcategory</p> <p>Always display the row and allow drilling to subcategory</p>
Items in categories	<p>Do not display row when no values exist or values are zeroes</p> <p>Display row if values are zeroes; hide if no values exist</p> <p>Always display the row</p>

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 doesn't provide clear information.

If you try mixing combinations of items that use different units of measure you get a warning. You make these configuration happen on either the category or summary. Graphs with incompatible items are hidden on the total compensation statement.

## Options to Display Title and Salary

You can display the latest title and salary for successive jobs in the statement header.

Here's when title and salary appear in the header:

- Person has only 1 assignment
- Person has only 1 assignment for the employer
- Person has more than 1 assignment, but the entire data of the statement comes from 1 assignment
- The data comes from more than 1 assignment but the person has only 1 valid or active assignment at the end of the period

This applies to both online and printable statements. This doesn't apply to multiple concurrent jobs where the data will only appear in the detail and not in the header, as per usual. In that case use the job column in category table to clarify what amount pertains to what job in the category table.





# 67 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
- Proration
- Compensation item testers
- 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.

Source Type	Description	Additional Data Entry Requirements
Benefit Balance	Compensation such as data obtained from a legacy compensation application entered as a one-time benefit balance.	<b>Type of Compensation</b>
Calculated Item	Create a calculation to define the value of an item and display it as descriptive text.	<b>Item Value, Operation, Fixed Number</b>
Element Entry	Compensation such as salary and bonus earnings retrieved from element entry whose pay period end dates fall within the statement period.	<b>Legislative Data Group, Payroll Element, and Input Value</b>
External Data	Compensation such as data internal to the organization from another system, or data from a third party supplier.	<b>Record Type, Column, and Type of Compensation.</b>

Source Type	Description	Additional Data Entry Requirements
Formula	Create a formula to retrieve compensation information that isn't stored in the other predefined source types.	<b>Type of Compensation</b> , nonmonetary <b>Unit of Measure</b> , <b>Rounding Rule</b> , and <b>Currency</b> . (Formula unit or currency overrides item definition)
Payroll Balance	Compensation such as commissions or company-paid taxes retrieved from payroll balance records. We support these payroll balance dimensions: <ul style="list-style-type: none"> <li>Relationship Period to Date</li> <li>Relationship Year to Date</li> <li>Term Period to Date</li> <li>Term Year to Date</li> <li>Assignment Period to Date</li> <li>Assignment Year to Date</li> <li>Fiscal Year to Date</li> <li>Inception to Date</li> <li>Rolling 12 Months</li> </ul>	<b>Legislative Data Group</b>
Salary	Compensation such as overall salaries.	<b>Salary Basis</b> , or all <b>Salary Basis</b> from a particular <b>Legislative Data Group</b> , or <b>All Salaries</b>
Salary Rates	Salary amount based on incremental components	<b>Base Salary</b> or <b>Allowances</b> or <b>Other</b>
Salary Simple Components	Salary amount based on standard components	<b>Base Salary</b> or <b>Allowances</b> or <b>Other</b>

## 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.

## Proration

You can control whether proration occurs for element entry style compensation items. You can enable proration or not for salary, and also enable it for other element entries. Use the **Allow Proration** radio buttons on the compensation item when the source type is Element Entry and Type of Compensation is Monetary. We recommend that you always select **Yes** for any element entries linked to a salary basis.

## Compensation Item Testers

Use the Test buttons to verify that the results are what you expect before you generate the statements.

## 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. Click the Validate button to validate your expectations for compensation items before you generate the statements.

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

The following input variables are available to formula of this type.

Input Value	Data Type	Required	Description
CMP_IV_PERIOD_ID	Char	Y	Period ID
CMP_IV_PERIOD_START_DATE	Date	Y	Statement Period Start Date
CMP_IV_PERIOD_END_DATE	Date	Y	Statement Period End Date

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

Return Value	Data Type	Required	Description
COMPENSATION_DATES	Date	Y	One to 15 transaction dates delimited by semicolon, maximum 250 characters.
VALUES	Char	Y	One to 15 transaction values delimited by semicolon, maximum 250 characters. Must be the same number of values as dates.
ASSIGNMENTS	Char	N	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 (; ;).
LEGALEMPLOYERS	Char	N	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 (; ;).
UNIT	Char	N	4 optional variables for every value and every variable can have more than one value delimited by “;”. Can return currency code from monetary units.
COMPENSATION_DATES1	Date	Y	Second variable for transaction dates from 16 to 30 if limit of 250 characters is exceeded.

Return Value	Data Type	Required	Description
VALUES1	Char	Y	Second variable for transaction values from 16 to 30 if limit of 250 characters is exceeded.
ASSIGNMENTS1	Char	N	Second variable for transaction assignments from 16 to 30 if limit of 250 characters is exceeded.
LEGALEMPLOYERS1	Char	N	Second variable for legal employer IDs from 16 to 30 if limit of 250 characters is exceeded.
UNIT1	Char	N	4 optional variables for every value and every variable can have more than one value delimited by “;”. Can return currency code from monetary units.
COMPENSATION_DATES2	Date	Y	Transaction dates from 31 to 45.
VALUES2	Char	Y	Transaction values from 31 to 45.
ASSIGNMENTS2	Char	N	Transaction assignments from 31 to 45.
LEGALEMPLOYERS2	Char	N	Legal employers from 31 to 45.
UNIT2	Char	N	4 optional variables for every value and every variable can have more than one value delimited by “;”. Can return currency code from monetary units.
COMPENSATION_DATES3	Dates	Y	Transaction dates from 46 to 60.
VALUES3	Char	Y	Transaction values from 46 to 60.
ASSIGNMENTS3	Char	N	Transaction assignments from 46 to 60.
LEGALEMPLOYERS3	Char	N	Legal employers from 46 to 60.
UNIT3	Char	N	4 optional variables for every value and every variable can have more than one value delimited by “;”. Can return currency code from monetary units.

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

```

/*****
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.

```

/*****
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'

UNIT = 'USD'
UNIT1 = 'EUR'
UNIT2 = 'AUD'
UNIT3 = 'CAD'

```

```
RETURN  
COMPENSATION_DATES,VALUES,COMPENSATION_DATES1,VALUES1,COMPENSATION_DATES2,VALUES2,COMPENSATION_DATES3,VALUES3,ASSIGNMENT  
GALEMPLOYERS,LEGALEMPLOYERS1,LEGALEMPLOYERS2,LEGALEMPLOYERS3,UNIT,UNIT1,UNIT2,UNIT3  
  
/*===== FORMULA SECTION END =====*/
```

### Related Topics

- [Formula Compilation Errors](#)
- [Formula Execution Errors](#)
- [When do I run the Compile Formula process?](#)
- [Example of Writing a Fast Formula Using Formula Text](#)

## 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.

Category Type	Default Columns	Configurable
<ul style="list-style-type: none"><li>• Benefits</li><li>• Cash Compensation</li><li>• Savings</li><li>• Retirement</li></ul>	<ul style="list-style-type: none"><li>• Worker contributions</li><li>• Employer contributions</li><li>• Description</li></ul>	<ul style="list-style-type: none"><li>• Add compensation items</li><li>• Nest categories within the category as subcategories</li><li>• Hide columns that don't apply</li></ul>
Time Off	<ul style="list-style-type: none"><li>• Type of time off</li><li>• Monetary value of the time off</li><li>• Accrued balance</li></ul>	<ul style="list-style-type: none"><li>• Edit column labels</li><li>• Configure category table row names as links to more information</li><li>• Can't nest categories as subcategories</li></ul>
Stock History	Select columns of data from the database table that stores workers' stock details	<ul style="list-style-type: none"><li>• Select which types of stock to include in the category</li><li>• Alter which columns are hidden or only available optionally in statement view menu</li><li>• Edit column labels</li><li>• Can't nest categories as subcategories</li></ul>
Other	Same basic structure as the Cash Compensation or Benefits category type	You can use it for any type of compensation

Category Type	Default Columns	Configurable
User-Defined	Specify the number of columns, up to five, that you want to include in the category	<ul style="list-style-type: none"><li>• Configure column labels</li><li>• Select compensation items for the table rows</li><li>• Can't nest categories as subcategories</li></ul>

## 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

### *Related Topics*

## 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.

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*

- [Options to Display Category Details in a Compensation Statement](#)
- [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

You need to consider certain statement elements and options when you plan how many different total compensation statement definitions to create and the presentation of content in each.

These are the statement elements and options to consider:

- 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:
    - Business unit
    - Benefits group
    - Legislative data group
    - Country
    - A person selection formula that you define
    - 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.
- Use the Preview Text in Printable Statements option to see what the statement looks like with placeholders, not real-time data.

If included, the welcome message is the first page the worker sees in the statement.

## Online and Printable Statements

You can configure either online or printable statements or both. Some options are available in certain statements.

### Online and Printable Statements

Option	Statement Type
Detail sections defined in the online statement drill downs	Both
Estimated stock values	Both
Display person mailing address columns	Both
Include category line item detail section option	Online only
Left menu navigation	Online only
Links within the statement navigation	Printable only
Mass generate statements	Printable only

## 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.

Option	Description
Person Name	Name information, such as <FIRST NAME>, <MIDDLE NAME>, and <LAST NAME>.

Option	Description
Employment	Location information, such as <DEPARTMENT>, <BUSINESS UNIT>, and <EMPLOYER>. Job information such, as <JOB>, <GRADE>, and <POSITION>.
Compensation Item	Compensation item information, such as bonus or car allowance. For example, you can select the <BONUS> compensation item.
Conditional Text	Compensation item information that appears when it meets the conditions that you create. For example, you can show the monthly salary: <Most recent [Pay Monthly] * 12 Is not blank) Or (Sum[Pay Monthly] Is not blank)>.
Miscellaneous	Date information, such as <STATEMENT START DATE> and <STATEMENT END DATE>

You can use the Fields icon to manage or reuse fields already created. You need to recreate the Conditional text from period to period.

#### Related Topics

- [Total Compensation Statement Options](#)

## Options to Configure Statement Periods, Welcome Message, and Feedback

Using the Statement Definitions Periods tab, you configure statement periods, an optional welcome message for each statement and feedback.

### 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:

- A recommended statement period display name  
Example: Name the period 2022 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

Use the item tester to validate your expectations for compensation items before you generate the statements. The item tester is available for all source types.

Optionally, you can enable feedback when people view their online statement. You can configure ratings and questions. People complete the feedback, and then compensation administrators and line managers can view it.

## Statement Periods to Display

Use the Configure Total Compensation Global Settings task to control the statement periods available to workers. If you don't enter a number, the worker sees all statements. If you enter 0, the worker doesn't see any statements. Finally, if you enter a number greater than 0, the worker sees that many statements.

## 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

## Feedback

You can find out how your people feel about total compensation. You start by enabling feedback on the Statement Periods tab. Then, configure your ratings and questions. You generate statements in the usual manner. The feedback appears on online statements only. People complete the feedback, so compensation analysts, compensation managers, and line managers can view the results.

Here's where you can see the feedback results:

- Compensation Work Area > Total Compensation > View Total Compensation Statement Reports
- My Team > Show More > Compensation > Total Compensation Statement Feedback

# 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.

## Printable Statement Templates

You can maintain, preview, and upload your printable statement templates using the Manage Template task in the Compensation work area.

You can use the delivered template as is or you can modify it, for example by adding your company logo. Then, you can click the upload action to upload the modified template. You can preview your uploaded template. Finally, on the Create or Edit Statement Definition page, Printable Statement Options tab, you can verify which template is used.

Using the Printable Statement Templates task to modify the delivered template ensures you follow the best practices for business intelligence customize feature.

## 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?

You can use the Manage Statement Definitions task in the Compensation work area to hide or show the message.

Follow these steps:

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?

Use the Manage Statement Definitions task in the Compensation work area to change the message.



Follow these steps:

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 total compensation statements and workforce compensation change statements?

Total compensation statements show base and variable pay, fringe benefits, and perks for a specified period of time, typically a year. These statements are available both online and in PDF format. You configure these statements using the Total Compensation Statement tasks in the Compensation

You configure these statements using the Total Compensation Statement tasks in the Compensation work area. Workforce compensation statements show recent changes to base and variable pay. They apply to a statement group, which has RTF templates that can include criteria to identify which people get the template.

For example, people in Spanish-speaking countries get the Spanish version of the statement. The workforce compensation plan containing the statement configuration determines the statement content. You configure these compensation change statements for a specific plan using the **Workforce Compensation Plans** task in the Compensation work area.

# 68 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.

Decision to Consider	Item in This Example
What compensation does the item represent?	Profit sharing bonus
What's the source type?	Payroll element
What's the legislative data group?	USA

The following table summarizes key decisions for the category in this scenario.

Decision to Consider	Category in This Example
What's the category type?	Cash Compensation
Display category details in the statement at what level?	Viewers see all details on one page.
Add items?	Yes: Profit sharing bonus, new hire bonus, and quarterly bonus.
Display graphs? How many? What type?	Yes. Two: Bar and stacked bar.
Hide or edit any columns in the category?	Hide worker contributions because this is a cash compensation category. Edit company contribution column name to make it familiar to workers.

## 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:
  - o New Hire Bonus
  - o 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:

Field	Value
Item Name	Profit Sharing Bonus
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Profit Sharing Bonus
Input Value	Pay Value

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.

Field	Value
Name	Bonus
Category Type	Cash Compensation

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.

Name	Description	Company Contribution (Items)
Profit Sharing	Profit Sharing Bonus	Profit Sharing Bonus
New Hire	New Hire Bonus	New Hire Bonus
Quarterly	Quarterly Bonus	Quarterly Bonus

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**.

## Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

Field	Value for the First Graph	Value for the Second Graph
<b>Graph Title</b>	Your Bonuses	How Your Bonuses Add Up
<b>Graph Type</b>	Bar	Bar - stacked
<b>Graph Items</b>	Amount	Amount

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**.

### Related Topics

- [Create a Total Compensation Statement](#)

## 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.

Decision to Consider	First Item	Second Item
What compensation does the item represent?	Worker contribution for medical benefit	Company contribution for medical benefit
What is the source type?	Payroll element	Payroll element
What is the legislative data group?	USA	USA

The following table summarizes key decisions for the category in this scenario.

Decision to Consider	Category in This Example
What is the category type?	Benefits
Display category details in the statement at what level?	Display details of item rows on separate pages that viewers drill to for details.
Add items? (Describe)	Yes: Both worker and company contributions for medical, dental, vision, disability insurance, and life insurance benefits.
Add other categories as subcategories? Describe	No
Display graphs? (No or Yes?) One or two? What type?	Yes. Two: Stacked bar and pie chart.
Hide or edit any columns in the category?	No
Display the row if values are zero in the period?	No

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:

Field	Value
Item Name	Medical Worker Contribution
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Medical Worker Contribution
Input Value	Pay Value

4. Click **Save and Create Another**.

5. On the Create Compensation Item page, complete the fields as shown in this table:

Field	Value
Item Name	Medical Company Contribution
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Medical Company Contribution
Input Value	Pay Value

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.

Field	Value
Name	Benefits
Category Type	Benefits

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.

Name	Description	Your Contribution (Items)	Company Contribution (Items)
Medical	Amounts reflect your coverage.	Medical Worker Contribution	Medical Company Contribution
Dental	Amounts reflect your coverage.	Dental Worker Contribution	Dental Company Contribution



Name	Description	Your Contribution (Items)	Company Contribution (Items)
Vision	Amounts reflect your coverage.	Vision Worker Contribution	Vision Company Contribution
Disability Insurance	LTD provides income protection.	Disability Worker Contribution	Disability Company Contribution
Life Insurance	Life insurance is a core benefit.	Life Insurance Worker Contribution	Life Insurance Company Contribution

## Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

Field	Value for the First Graph	Value for the Second Graph
<b>Graph Title</b>	Employee Versus Company Contributions	Total Contribution Comparison
<b>Graph Type</b>	Bar	Pie
<b>Graph Items</b>	Your Contribution, Company Contribution	Your Contribution, Company Contribution

3. Click **Save**.
4. Click **OK** in the confirmation.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what is 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**.

### Related Topics

- [Create a Total Compensation Statement](#)

## 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.

Decision to Consider	Category in This Example
What is the category type?	User-Defined
Display category details in the statement at what level?	Viewers see all details on one page.
Add items?	Yes: Sales target, sales revenue, and commissions items for year end.
Display graphs? How many? What type?	Yes. Two bar charts, one for revenue generated and one for commissions earned.
Hide or edit any columns in the category?	Edit column labels.

## 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.

Field	Value
Name	Commissions
Category Type	User-Defined
Number of Item Columns	3

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.

Name	Description	Sales Target (Item)	Sales Revenue (Item)	Commission (Item)
Row 1	Year End Activity	Sales Target Year End	Sales Revenue Year End	Commission Year End

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.

Field	Value for the First Graph	Value for the Second Graph
<b>Graph Title</b>	Revenue Generated	Commissions Earned
<b>Graph Type</b>	Bar	Bar
<b>Graph Items</b>	Sales Revenue	Commissions

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**.

### Related Topics

- [Create a Total Compensation Statement](#)

# 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.

Decision to Consider	Category in This Example
What's the category type?	Stock History
Display category details in the statement at what level?	Viewers see all details on one page.
Display graphs? How many? What type?	Yes. <ul style="list-style-type: none"><li>• One Pie to display Nonmonetary (Shares)</li><li>• Oone Bar to display Monetary (Estimated Values)</li></ul>
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.

Field	Value
Name	Stock History
Category Type	Stock History

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.

Sequence	Column Type	Column Label	Available for Display in Online Statement
1	Original Grant Date	Grant Date	(Use default)
3	Grant Number	(Use default)	Select
10	Original Value at Grant	Grant Value	(Use default)
16	Estimated Market Value of Total Shares	Estimated Market Value	(Use default)
17	Vested Shares	(Use default)	Select
18	Exercised Shares	(Use default)	Select
20	Estimated Gain from Vested Shares	(Use default)	Deselect
25	Exercise Date	(Use default)	Select

## Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields, as shown in this table.

Field	Value for the First Graph
Graph Title	Vested Versus Unvested Shares
Graph Type	Pie
Nonmonetary Graph Items	Vested Shares, Unvested Shares
Graph Title	Estimated Values
Graph Type	Bar

Field	Value for the First Graph
Monetary Graph Items	Estimated Market Value of Total Shares, Estimated Gain from Vested Shares

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**.

#### Related Topics

- [Create a Total Compensation Statement](#)

## 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.

Decision to Consider	Cash Compensation Category	Stock Category
What is the category type?	Cash Compensation	Other
Display category details in the statement at what level?	Display details of item and subcategory rows on separate pages that viewers drill to for details.	Display details of item and subcategory rows on separate pages that viewers drill to for details.
Add items?	Yes: Base pay for exempt workers	Not directly, only through subcategories.
Add other categories as subcategories?	Yes. One: Bonuses Exempts	Yes. Two: ESPP Exempts and Stock History Exempts

Decision to Consider	Cash Compensation Category	Stock Category
Display graphs? How many? What type?	Yes. Two: Bar and stacked bar.	No
Hide or edit any columns in the category?	Hide worker contributions because this is a cash compensation category. Edit subcategory names to make them familiar to workers.	Edit subcategory names to make them familiar to workers.
Display the row if values are zero or no in the period?	No	Display the Employee Stock Purchase Plan row but prevent drilling to details.

The following table summarizes key decisions for the statement definition in this scenario.

Decision to Consider	Statement Definition in This Example
Include which top-level categories?	Cash Compensation and Stock
What is the statement period?	Calendar year 2015 Also create a second annual period to be ready for the next year.
Include welcome message?	Yes. Address recipients by first name.
Include summary page?	Yes
What is the statement audience for eligibility?	Individual contributors whose salaries are quoted on an annual basis
What is the population for statement generation?	Legal employer: Infusion USA

## 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:

Field	Value
Item Name	Base Pay Exempts
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Base Pay Exempts
Input Value	Pay Value

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.

## 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.

## 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.

## 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.

Field	Value for the First Graph	Value for the Second Graph
Graph Title	Your Total Compensation	How Your Compensation Adds Up
Graph Type	Bar	Bar - stacked
Graph Items	Company Contributions	Company Contributions

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.

