# Oracle Fusion Cloud Human Resources

## How do I set up a grade ladder for grade step progression?

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G42351-01

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# 1  How do I set up a grade ladder for grade step progression?

## Create a Progression Grade Ladder

Here's how you create a progression grader ladder to use with the Run Grade Step Progression and Synchronize Grade Step Rate processes, or to default the amounts from grade ladder rates during HR actions.

1. Confirm that the group 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. Go to **My Client Groups** > **Compensation** > **Lookups**.
2. Confirm that the grades exist. If needed, create them using the **My Client Groups** > **Compensation** > **Grades**
3. Create a progression grade ladder with or without steps.
   a. Add either **Progression Grade Ladder for Grades with Steps** or **Progression Grade Ladder for Grades Without Steps**.
   b. Complete the ladder details. Keep these key considerations in mind when making certain selections.

| Field | Considerations |
|---|---|
| Progression Increment | When Grade Type is **Grade**, you can specify whether to evaluate only the next grade in the ladder or all grades. <br><br> When Grade Type is **Grade with step**, you can specify how many steps to evaluate and whether to stop at the ceiling step. <br><br> If you're not using the batch processes: Select any value because this required field applies only to grade step progression processing. |
| 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 **Process run date**. <br> If you're not using the batch processes: Select any value because this required field applies only to grade step progression processing. |
| Confirmation Type | To have people accept or reject proposed progressions as part of their review, select **Manual**. <br><br> To have the Run Grade Step Progression process accept the proposals and updates as part of its processing, select **Automatic**. <br><br> If you're not using the batch processes: Select any value because this required field applies only to grade step progression processing. |

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| Field | Considerations |
|---|---|
| Assignment Action | If people leave the actions blank when they submit a process, it uses this action.<br>If you're not using the batch processes: Select any value because this required field applies only to grade step progression processing. |
| Grade Ladder Group | To include the ladder with other progression grade ladders in a single batch for progression processing, select the appropriate group. |

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

| Field | Considerations |
|---|---|
| Include Salary Updates | You're specifying how the Run Grade Step Progression process updates a person's assignment and salary records.<br><br>- **No** (default): The process updates the grade or step value on the assignment, but not the salary amount.<br>- **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.<br>- When you select **Yes**, you can configure more attributes related to salary updates and rate synchronization.<br>To default the salary from grade ladder rates, you need to select **Yes**. |
| Salary Calculation Method | To calculate salary using the rates from your progression grade ladder, select **Use grade step rate**. You can also choose to write a formula to determine the rate.<br>To default the salary from grade ladder rates, you need to select **Use grade step rate**. Formulas aren't supported for salary default. |
| Transaction Date | To use the assignment date as the date for the updated salary record the Run Grade Step Progression process creates, select **Grade step change date**.<br><br>If you're not using the batch processes: Select any value because this required field applies only to grade step progression processing. |
| Salary Adjustment Type | To prorate the rates from the grade ladder according to the person's assignment FTE value, select an adjustment type. |

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

| Field | Considerations |
|---|---|
| Transaction Date | Set the date for the updated salary record created by the Synchronize Grade Step Rates process:<br><br>- To make it the same date as the effective date of the process, select **Process run date**. |

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| Field | Considerations |
|---|---|
|  | – To make it the same date as when the rate changed on the grade ladder, select **Grade step rate change date**.<br>If you're not using the batch processes: Select any value because this required field applies only to grade step progression processing. |
| Confirmation Type | To have people accept or reject salary updates as part of their review, select **Manual**.<br>To have the Synchronize Grade Step Rates process accept the proposals and updates as part of its processing, select **Automatic**.<br><br>If you're not using the batch processes: Select any value because this required field applies only to grade step progression processing. |

4. Add a rate definition.
   a. Give the rate a name. It's good practice to use the same name as your grade ladder, but you can also use a different name.
   b. Specify the legislative data group. It should be the same legislative data group that you used for the grade ladder.
   c. Set the rate type to **Salary**.
   d. Select the frequency and annualization factor.
   e. The currency will default from the legislative data group.
   f. Set the rate as a progression rate.
5. Add grades.
   a. Search for and select a grade to add. Your Grade Type selection decides which grades you see in the list, meaning, whether the grades have steps or not.
   b. When you add a grade after the first grade, select a position for the grade in the grade ladder. You can add it at the beginning of the grade ladder, at the end, before a specific grade, or after a specific grade.
6. Add rate values.
   ○ If your grades have steps, click the link in the **Step Rate Values** column to add rate values to each step.
   ○ If your grades don't have steps, enter the grade rate values directly in the table.

*Related Topics*
- Overview of Grade Step Progression Processing
- Basic Process to Default Salary Amounts from Grade Ladder Rates

# Grade Type and Progression Increment Options in the Run Grade Step Progression Process

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.

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## 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*
- Grade Step Progression Processing
- How You Can Propose Progression and Salary Update According to Eligibility
- How You Update Salary According to New Progression Grade Ladder Rates

# How Progression Date Code Sets the Assignment Start Date

The Run Grade Step Progression process sets the start date of the updated assignment. It uses the value of the Progression Date Code on the Grade Ladders page.

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

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| 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 Progression Date Code 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*
- On Eligibility Option for Progression Date Code
- Create a Progression Grade Ladder
- Effective Dates and Transaction Dates in Grade Step Progression Processing
- Grade Step Progression Processing

# On Eligibility Option for Progression Date Code

When Progression Date Code is set to **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, 20201. 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 device 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

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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*
- Create a Progression Grade Ladder
- Global Grade Step Progression Processing Settings for Batch Processes
- Effective Dates and Transaction Dates in Grade Step Progression Processing
- Grade Step Progression Processing

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

Batch error condition settings can prevent processing of grade step progressions when a future-dated assignment or salary exists. If Progression Date Code is **On eligibility**, the future-dated assignment or salary can be relative to any dates in 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 Progression Date Code
- Create a Progression Grade Ladder
- Global Grade Step Progression Processing Settings for Batch Processes
- Effective Dates and Transaction Dates in Grade Step Progression Processing
- Grade Step Progression Processing

# How Salary Date Code Sets the Salary Start Date

The Run Grade Step Progression process sets the start date of the updated salary. It uses the Salary Date Code option in the Salary Update section of the Grade Ladders page.

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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 Progression Date Code value selected in the Basic 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*

- Create a Progression Grade Ladder
- Effective Dates and Transaction Dates in Grade Step Progression Processing
- Grade Step Progression Processing

# How Rate Synchronization Date Code Sets Salary Start Date

The Synchronize Grade Step Rates process sets the start date of the updated salary. It uses the Rate Synchronization Date Code option in the Rate synchronization section of the Grade Ladders 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 |
| 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 **January 15, 2021**, the start of next month date is **February 1, 2021**. | 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 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**. | 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 to 30 each month. If the effective date of the | Salary start dates |

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| Option | Start Date the Process Sets for the Updated Assignment | Possible Exception |
|--------|--------------------------------------------------------|--------------------|
|  | 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. | Salary start and end dates |

For more information about these possible exceptions, see *Salary Start Date Exceptions for Rate Synchronization Date Code* and *Salary End Date Exceptions for Rate Synchronization Date Code*.

*Related Topics*
- How Salary Date Code Sets the Salary Start Date
- Create a Progression Grade Ladder
- Effective Dates and Transaction Dates in Grade Step Progression Processing
- Grade Step Progression Processing

# Salary Start Date Exceptions for Rate Synchronization Date Code

The Synchronize Grade Step Rates process sets the salary start date using the value selected for the rate synchronization date code.

Sometimes the calculated salary start date is before the date the person moved to their current step or grade. This can happen when Rate Synchronization Date Code 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 Rate Synchronization Date Code 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 rate synchronization date code 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 to 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*
- Create a Progression Grade Ladder
- Effective Dates and Transaction Dates in Grade Step Progression Processing
- Grade Step Progression Processing

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# Salary End Date Exceptions for Rate Synchronization Date Code

The Synchronize Grade Step Rates process sets the salary start date using the value selected for the rate synchronization date code.

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 Rate Synchronization Date Code 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, Rate Sychronization Date Code 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*

- Create a Progression Grade Ladder
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