Oracle Fusion Cloud Human Resources

How do I manage grade step progression processes?

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Oracle Fusion Cloud Human Resources How do I manage grade step progression processes?



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1 Basic Configuration Process

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.** Create a progression grade ladder.
- 2. 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 Progression Grade Ladders, Rates, and Rules for Compensation chapter. And you can 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*.

- Grade Step Progression Processing
- Results and Statuses for Proposed Progression and Salary Updates
- Default Salary Amounts from Grade Ladder Rates





2 Global Settings for Grade Step Progression Processing

Global Grade Step Progression Processing Settings for Batch Processes

To specify the behavior of batch processes, go to **My Client Groups > Compensation > Grade Step Progression Settings**.

Maximum Eligibility Look-Back Days

To limit the start of the date range when Progression Date Code 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 Dates and Transaction Dates in Grade Step Progression Processing



Assignment Date Error Conditions in Grade Step Progression Batch Processing

To configure error conditions in grade step progression that relate to the assignment date, go to **My Client Groups** > **Compensation** > **Grade Step Progression Settings**.

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 have 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.

- Grade Step Progression Processing
- Manage Grade Step Progression
- Results and Statuses for Proposed Progression and Salary Updates
- Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates



Salary Date Error Conditions in Grade Step Progression Batch Processing

To configure error conditions in grade step progression that relate to the salary date, go to **My Client Groups** > **Compensation** > **Grade Step Progression Settings**.

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 futuredated 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.

- Grade Step Progression Processing
- Manage Grade Step Progression
- Results and Statuses for Proposed Progression and Salary Updates
- Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates



3 Grade Step Progression Processing

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

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.



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 device date at runtime.

Synchronize Grade Step Rate

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	М	Т	W	Т	F	S	S	М	Т	W	Т	F	S	S	М	Т	W	Т	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	М	Т	W	Т	F	S	S	М	Т	W	Т	F	S	S	М	Τ	W	Т	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		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	М	Т	W	Т	F	S	S	М	T	W	Т	F	S	S	М	Т	W	Т	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		25	
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.

Include in Grade Step Progression Attribute and 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.

The attribute works with the Exclude assignment from synchronize rate process if excluded from grade step progression process setting. To update this setting, go to My Client Groups > Compensation > Grade Step Progressions Settings.

Here's what happens if you select the **Exclude assignment from synchronize rate process if excluded from grade step progression process** setting.

- If the **Include in Grade Step Progression** assignment attribute is **Y**, both processes include the assignment.
- If the Include in Grade Step Progression assignment attribute 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** setting.

If the Include in Grade Step Progression assignment attribute is Y, both processes include the assignment.



• If the **Include in Grade Step Progression** assignment attribute 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

Global Grade Step Progression Processing Settings for Batch Processes

Include Multiple Progression Grade Ladders in a Batch Process

Here's how to include a group of grade ladders in a Run Grade Step Progression or Synchronize Grade Step Rates process:

- 1. Set Batch Type to **Grade ladder group**.
- 2. Select the specific group to use. For example, to run grade step progression or sync rates for all ladders in the North region, you select your **North Region** grade ladder group.

Related Topics

• Results and Statuses for Proposed Progression and Salary Updates

Assignment and Salary Actions and Action Reasons in Grade Step Progression Processing

When you run the Run Grade Step Progression and Synchronize Grade Step Rates processes, specify the actions and action reasons to use for the updated assignment and salary.

There's one delivered action for assignments and two delivered actions for salaries. You can use these actions, or you can optionally set up custom actions. To set up custom actions for grade step progression processes, use the **Configure Actions** task and the **Grade Step Progression** action type. The Grade Step Progression action type doesn't use these values, so you can leave them blank: Used in Contract, Country, Role, and Reorganization Related.



How the Processes Decide the Action and Action Reason to Use

The processes follow this hierarchy to get the values for action and action reason:

- If you select an assignment action when you submit the process, the process uses that action and the selected action reason. If you leave the action reason blank, assignments won't have an action reason.
- If you select a salary action when you submit the process, the process uses that action and the selected action reason. If you leave the action reason blank, salaries won't have an action reason.
- If you don't select an assignment action when you submit the process, the process uses the assignment action and action reason defined on the progression grade ladder.
- If you don't select a salary action during submission, here's what happens:
 - Run Grade Step Progression uses the Salary Action and Salary Action Reason from the grade ladder, if Salary Action is defined.
 - Synchronize Grade Step Rates uses the Rate Synchronization Action and Rate Synchronization Action Reason from grade ladder, if the Rate Synchronization Action is defined.
 - o If action reason is blank, salaries won't have an action reason.
- If you don't select a salary action during submission or on the grade ladder, the salary action and action reason are the assignment action and action reason you defined on the progression grade ladder.

How to Define Actions So You Can Reuse the Action Occurrence Identifier of the Assignment Whenever a Matching Action and Reason Exists for the Salary Start Date

You can optionally reuse the action occurrence identifier of the assignment whenever a matching action and reason exists for the salary start date. If you use this feature, make sure that the Run Grade Step Progression process uses the same action and reason for the assignment and salary record.

- To do this, use the same values for Assignment Action, Assignment Action Reason and for Salary Action and Salary Action Reason in your progression grade ladder definition.
- If you override the action and reason when submitting Run Grade Step Progression, make sure to select the same values for assignment and salary.
- The values you select for Synchronize Grade Step Rates don't matter, because this process only updates salary and not assignment.

Delivered Actions for Grade Step Progression

There are three delivered actions for the Grade Step Progression action type. There are some limitations on the use of these actions.

Delivered Action	Applicable Process	Comments				
Automated Grade Step Progression	Run Grade Step Progression	Can't use with the Synchronize Grade Step Rates process.				
Grade Step Rate Synchronization	Synchronize Grade Step Rates	Can't use with the Run Grade Step Progression process.				
Grade Step Change	NA	Used in prior releases on classic pages to default salary from grade ladder rates. The				



Delivered Action	Applicable Process	Comments				
		feature is decommissioned, but the action remains for use in historical data.				

Related Topics

- Manual Progression and Synchronization Process Actions
- Results and Statuses for Proposed Progression and Salary Updates
- Grade Step Progression Settings for Defaulting Salary from Grade Ladder Rates
- Create a Progression Grade Ladder

Progression Grade Ladder and Salary Basis Frequencies 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

- Results and Statuses for Proposed Progression and Salary Updates
- Create a Progression Grade Ladder

Effective Dates 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. 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

Transaction dates are identified by these date codes set on the grade ladder:

- Progression Date Code: Used by the Run Grade Step Progression process to set the assignment start date.
- Salary Date Code: Used by the Run Grade Step Progression process to set the salary start date.
- Rate Synchronization Date Code: Used by the Synchronize Grade Step Rates process to set the salary start date.

Related Topics

- How Progression Date Code Sets the Assignment Start Date
- How Salary Date Code Sets the Salary Start Date
- How Rate Synchronization Date Code Sets Salary Start Date

Generate a Transaction Report for Grade Step Progression

You can opt to create a transaction report when you submit a Run Grade Step Progression or Synchronize Grade Step Rates process. The text file contains detail for all the transactions and includes error conditions found during processing.

Here's how you generate the report:

- 1. While setting up either batch process, select the **Create transaction report** checkbox.
- 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.

Grade Step Progression Diagnostics

The Grade Step Progression Diagnostics report helps you diagnose any issues with a person's data that might affect processing. It's available on the Diagnostic Dashboard page. You'll need to provide either the grade ladder or person number as an input.



4 Examples of Grade Step Progression Processing

How You Can 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

- Grade Step Progression Processing
- Grade Type and Progression Increment Options in the Run Grade Step Progression Process

How You 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

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 Rate Synchronization Date Code on the Grade Ladders page decides the effective date of the salary update.

- Grade Step Progression Processing
- Parameters That Affect Salary Amounts for Proposed Progression and Salary Updates

