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# PeopleSoft HCM 9.2: eCompensation Manager Desktop

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March 2013

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# Contents

<b>Preface.....</b>	<b>ix</b>
Understanding the PeopleSoft Online Help and PeopleBooks.....	ix
PeopleSoft Hosted Documentation.....	ix
Locally Installed Help.....	ix
Downloadable PeopleBook PDF Files.....	ix
Common Help Documentation.....	ix
Field and Control Definitions.....	x
Typographical Conventions.....	x
ISO Country and Currency Codes.....	xi
Region and Industry Identifiers.....	xi
Access to Oracle Support.....	xii
Documentation Accessibility.....	xii
Using and Managing the PeopleSoft Online Help.....	xii
PeopleSoft HCM Related Links.....	xii
Contact Us.....	xiii
Follow Us.....	xiii
<b>Chapter 1: Getting Started with eCompensation Manager Desktop.....</b>	<b>15</b>
eCompensation Manager Desktop Overview.....	15
eCompensation Manager Desktop Integrations.....	16
eCompensation Manager Desktop Implementation.....	17
<b>Chapter 2: Understanding Compensation Cycles.....</b>	<b>19</b>
Compensation Cycles in eCompensation Manager Desktop.....	19
Salary Plans for Workforce Administration.....	20
Groups.....	21
Trees.....	21
How Trees are Defined.....	21
When Employees are Not Associated to Trees.....	23
Salary Plans in Compensation Cycles.....	23
Configurable Matrices.....	24
Variable Compensation Plans.....	25
Approval Transaction Configuration.....	25
Approval Transactions.....	26
Route for Approval Events.....	26
Email Templates.....	27
Compensation Cycles.....	30
Administering the Compensation Process.....	30
Cycle Statuses.....	31
Group Statuses.....	32
Proposal Statuses.....	32
Security Considerations.....	33
Compensation Alerts.....	34
Document and Link Configuration.....	34
Common Elements Used in eCompensation Manager Desktop.....	36
<b>Chapter 3: Setting Up and Implementing Compensation Cycles.....</b>	<b>39</b>
Building Trees.....	39
Page Used to Build Trees.....	39
Tree Builder Utility Page.....	39

Setting Up Prorate and Rounding Rules.....	41
Pages Used to Define Prorate and Rounding Rules.....	41
Understanding the Use of Rounding Rules.....	41
Understanding Proration Calculation Rules.....	43
Define Rounding Rules Page.....	43
Define Prorate Rules Page.....	45
Defining Compensation Cycles.....	47
Pages Used to Define Compensation Cycles.....	47
Prerequisites for Defining Compensation Cycles.....	48
Define Compensation Cycles - General Page.....	48
Define Compensation Cycles - Salary Page.....	52
Define Compensation Cycles - Awards Page.....	55
Define Compensation Cycles - Self-Service Page.....	57
<b>Chapter 4: Configuring Chart Alerts.....</b>	<b>63</b>
Defining, Configuring, and Maintaining Compensation Alerts.....	63
Pages Used to Define, Configure, and Maintain Compensation Alerts.....	63
Compensation Alert Definition Page.....	63
Maintain Text Catalog Page.....	65
Compensation Alert Maintenance Page.....	67
<b>Chapter 5: Administering Compensation Cycles.....</b>	<b>69</b>
Understanding Cycle Administration.....	69
Understanding the Cycle Build Process.....	69
Understanding Job Change Processing During Open Cycles.....	70
Processing Job Changes.....	72
Considerations for Job Change Processing.....	73
Understanding the Cycle Load Process.....	74
Administering Compensation Cycles.....	77
Pages Used to Administer Compensation Cycles.....	77
Administer Cycle Page.....	78
Access Rules Page.....	80
Summary Page.....	81
Build Cycle Page.....	82
Load Salary Updates and Awards Page.....	82
Process Job Changes Page.....	83
Manage Cycle Transactions Page.....	84
Manage Cycle Transactions - Direct Reports Page.....	86
Administering Cycle Roles.....	88
Page Used to Manage Cycle Roles.....	88
Understanding Cycle Roles.....	89
Administer Cycle Roles Page.....	89
Manually Distributing Funding Information for Cash, Non-Cash and Stock Awards.....	91
Pages Used to Manually Distribute Funding Information.....	91
Understanding Manual Funding Distribution.....	91
Fund Cycle by Group Page.....	91
Fund Cycle by Individual Page.....	93
Fund Cycle Manual Plans Page.....	95
<b>Chapter 6: Approvals and Delegations Integration.....</b>	<b>97</b>
Understanding Approvals and Delegations in Compensation.....	97
<b>Chapter 7: Allocating Compensation Information.....</b>	<b>99</b>
Allocating Compensation.....	99
Pages Used to Allocate Compensation.....	99

Allocate Compensation - Select a Compensation Activity Page.....	100
Allocate Compensation Page.....	100
Allocate Compensation - Direct Reports Page.....	104
Allocate Compensation Page (Indirect Reports).....	106
Job Changes Page.....	107
<b>Chapter 8: Working with Pivot Grids in Compensation.....</b>	<b>109</b>
Understanding Compensation Pivot Grids.....	109
Delivered Compensation Pivot Grids (Available on the Allocate Compensation Page).....	109
Delivered Compensation Pivot Grids (Available on the Administer Compensation Page).....	110
Viewing Compensation Pivot Grids.....	110
Pages Used to View Compensation Pivot Grids.....	111
Common Elements Used in This Section.....	111
Salary Increase by Performance Page.....	112
Variable Compensation by Performance Page.....	114
Salary Analysis Page.....	116
Compensation Distribution Page.....	118
Cycle Guideline Alert Page.....	120
Cycle Tracking Page.....	122
<b>Chapter 9: Reviewing Employee Compensation.....</b>	<b>127</b>
Understanding Compensation History.....	127
Reviewing Employee Compensation.....	127
Pages Used to Review Employee Compensation.....	127
Compensation History Page.....	128
Compensation History Chart Page.....	128
Award Details Page.....	130
<b>Chapter 10: Changing Employee Salaries When No Allocated Budget Exists.....</b>	<b>131</b>
Understanding the Change Employee Salary Process.....	131
Prerequisites.....	131
Changing Employee Salaries When No Allocated Budget Exists.....	132
Pages Used to Change Employee Salary When No Allocated Budget Exists.....	132
Request Ad Hoc Salary Change Page (Select Employee).....	133
Request Ad Hoc Salary Change Page.....	134
Select Transaction to Approve Page.....	135
Approve Ad Hoc Salary Change Page.....	136
View Ad Hoc Salary Change Status Page.....	138
Administer Request Page.....	139
Handling Errors or Warnings.....	141
<b>Chapter 11: Changing Budgeted Salaries for Employees.....</b>	<b>143</b>
Understanding Budgeted Salary Changes.....	143
Prerequisites.....	143
Entering Budgeted Salary Change Requests.....	143
Pages Used to Request Budgeted Salary Changes.....	144
Approving Budgeted Salary Changes.....	144
Pages Used to Approve Budgeted Salary Changes.....	144
Viewing the Statuses of Salary Changes.....	145
Pages Used to View Salary Change Statuses.....	145





# Preface

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## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

### Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

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**Note:** Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

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### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<i><b>Typographical Convention</b></i>	<i><b>Description</b></i>
<b>Bold</b>	Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  Italics also highlight references to words or letters, as in the following example: Enter the letter <i>O</i> .
Key+Key	Indicates a key combination action. For example, a plus sign ( + ) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
Monospace font	Highlights a PeopleCode program or other code example.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

<b><i>Typographical Convention</i></b>	<b><i>Description</i></b>
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (   ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY\_CD\_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY\_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America

- North America

## Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

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## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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## Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

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## PeopleSoft HCM Related Links

[PeopleSoft Information Portal on Oracle.com](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[HCM Abbreviations](#)

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## Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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# Getting Started with eCompensation Manager Desktop

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## eCompensation Manager Desktop Overview

eCompensation Manager Desktop provides these features:

- Compensation Cycles

Administrators can define compensation cycles for salary increases and variable compensation bonus plans, and decide how fields are displayed in manager self-service.

- Cycle Roles

Administrators can control access to specific compensation cycles by users that have manager and compensation administrator roles.

- Allocate Compensation

Managers can enter and submit changes to the proposed compensation amounts allocated to their direct reports.

- Approvals and Delegations Integration

eCompensation Manager Desktop provides approval and access role delegation transactions that can be implemented to allow an individual to specify a proxy to act on their behalf.

- Approve Compensation

After the manager submits their updated proposed compensation for their direct reports, the system routes it for approval. The levels of approval and the approvers are configured in the approval setup tables and listed on the Approval page.

- Compensation History

Managers can review or verify compensation history (base salary, variable cash, variable non-cash, and stock option) for employees.

- Request Ad Hoc Salary Change

Managers can request a salary increase for an employee or group.

- Approve Ad Hoc Salary Change

After the manager completes the ad hoc salary request, it is routed for approval. The levels of approval and the approvers are set up in the approval setup tables and listed on the Approval page.

- View Ad Hoc Change Status

Managers can view the status of ad hoc salary change requests submitted in the Request Ad Hoc Salary Change transaction.

- Request Budgeted Salary Change

Managers can request or perform a merit increase for a group of employees, based on the salary increase budget approved by the appropriate departments.

- Approve Budgeted Salary Change

After the manager completes the salary change request, it is routed for approval. The levels of approval and approvers are set up in the approval setup tables and listed on the Approval page.

- View Budgeted Salary Change Status

Managers can view the status of all salary change requests submitted in the Salary Change for Groups with an Allocated Budget.

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## eCompensation Manager Desktop Integrations

eCompensation Manager Desktop integrates with PeopleSoft HCM applications, with other PeopleSoft applications, and with third-party applications. Human Resources shared tables are available to many HCM applications. In addition, data in many HR tables are available to any PeopleSoft application that is set up to subscribe to the published messages. The eCompensation Manager Desktop business processes integrate with these PeopleSoft applications:

- PeopleSoft HCM.
- PeopleSoft Stock Administration.
- PeopleSoft ePerformance.
- PeopleSoft Global Payroll.
- PeopleSoft Payroll for North America.
- PeopleSoft Payroll Interface.

In PeopleSoft HCM, eCompensation integrates with ePerformance to drive funding based on performance achievements. This integration also enforces proposal guidelines.

Stock awards are given through the Variable Compensation business process. Because of this integration, stock awards are included with all other variable monetary and non-monetary awards for total variable compensation reporting and history. Stock Administration grants and administers stock awards after they are approved and received from HCM as service operations. Both Stock Administration and Variable Compensation use the group build feature so that when groups are used, they are consistent between the two systems.



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## eCompensation Manager Desktop Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

### **Related Links**

*PeopleSoft HCM 9.2: Application Fundamentals*



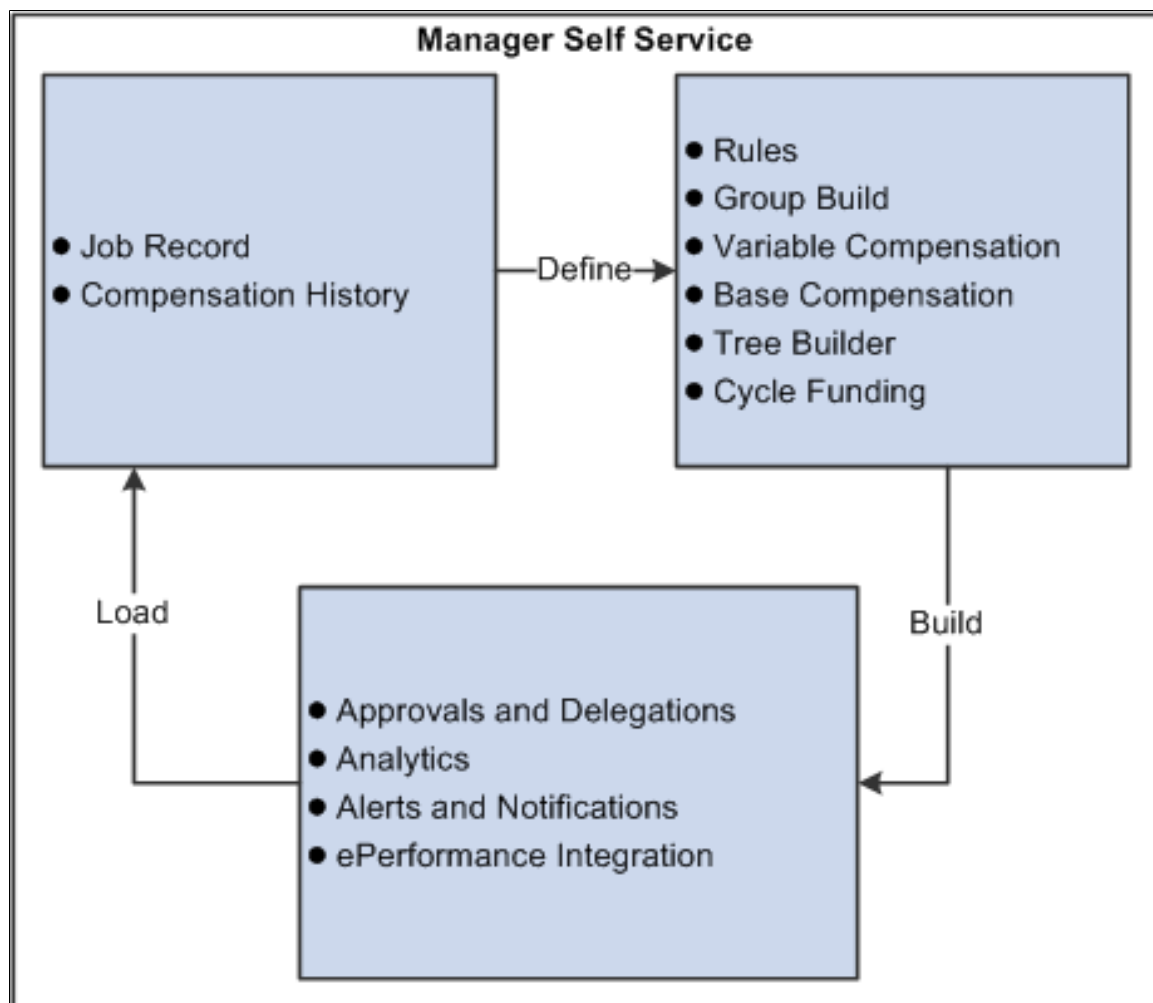
# Understanding Compensation Cycles

## Compensation Cycles in eCompensation Manager Desktop

Compensation Cycle is compensation activity that is established for a specific period of time (for example, the annual merit increase or bonus awards that are typically performed after the employee's annual performance evaluation).

### Image: Business process flow for implementing Compensation Cycles

This diagram illustrates, at a high level, the business process flow for implementing Compensation Cycles in eCompensation Manager Desktop.



Here is a brief summary of some of the steps that you may need to complete to set up and implement compensation cycles:

- Define base compensation.

- Define rules.
- Define Variable Compensation plans.
- Define or update trees.

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**Note:** The Tree Definition is used to further breakdown your eligible population into groups that will be assigned role access (for example, Submitter, Reviewer, Confirmer, and so on) to enter and approve proposals.

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- Define eligible compensation groups using PeopleSoft Group Build.
- Define cycle funding.
- Specify the approval and delegation process that will be used.
- Use summary analytics to review the compensation data contained in the cycle.
- Maintain alerts and notifications.
- Make sure ePerformance document types have been defined if the cycle is applying ePerformance integration (optional).

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**Note:** eCompensation integrates with ePerformance to drive funding based on performance achievements. This integration also enforces proposal guidelines.

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- Run the Load Salary Updates and Awards process.

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**Note:** This process loads salary updates to the Job and Compensation History records of employees and award updates back to the PeopleSoft Variable Compensation application. The system applies the updates and integrates the information with payroll.

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## Related Links

"Setting Up Group Definitions (*PeopleSoft HCM 9.2: Application Fundamentals*)"

"Setting Up Group Security (*PeopleSoft HCM 9.2: Application Fundamentals*)"

"Updating Salary Information (*PeopleSoft HCM 9.2: Human Resources Administer Workforce*)"

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## Salary Plans for Workforce Administration

Salary plans represent individual compensation programs such as merit increases, optional increases, bonuses, or incentive stock options and include specific qualifications and funding.

Before you can use the eCompensation Manager Desktop business process, you need to set up the control tables that support it. You define your salary plans, grades, and steps on a series of control tables. At each level, you define parameters such as review rating scale and currency.

Depending upon how your organization defines its salary structures, you may set up salary increase matrix guidelines on the Salary Increase Matrix Table page. Set up this table only if you use matrix guidelines in your organization to plan salary increases.

Define each salary plan with a unique ID on the Define Salary Plan page. For each salary grade, you may set up salary steps with pay components and their compensation values and currency on the Salary Step Components page. The system uses salary structures to establish default compensation packages. For this reason, you can access the same salary plan setup pages through the Workforce Administration menu.

### Related Links

"Setting Up Salary Plans, Grades, and Steps (*PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting*)"

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## Groups

The Group Build feature is the standard way to create groups of people in HCM. This feature enables you to define specific criteria using various records and fields. For example, you can define group criteria using fields from tables like Job Data, Employment Data, and Compensation.

You could also define a group that includes everyone in departments 10200 through 10500, where the Compensation Rate Code is equal to *NAANNL*.

Eligible participants for a compensation cycle are primarily determined by the group ID that you specify on the Compensation Cycle Definition page.

The Compensation Cycle Build process calls the Group Build process for the group ID on your Compensation Cycle definition. For each employee returned by the Group Build process, the Compensation Cycle Build process prepares and calculates funding for the Salary and Variable Compensation plans that you have associated to your Compensation Cycle definition.

### Related Links

"Understanding Group Build (*PeopleSoft HCM 9.2: Application Fundamentals*)"

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## Trees

This section discusses:

- How trees are defined.
- When employees are not associated to trees.

### How Trees are Defined

The PeopleSoft eCompensation Manager Desktop application is providing a Tree Builder Utility that uses application classes to derive the organizational basis for the tree. To build a tree that is maintained in the Tree Manager application within PeopleTools, these components must be in place:

- An applicable tree structure definition.

This structure defines the type of content the tree contains and has references to a supporting record, page, and component where that content can be accessed.

- A page and component where the node content can be viewed or maintained.
- A record that can associate the node references (the keys) with the actual content items.

The two primary hierarchies that we recommend are supervisor and position. This requires a new tree structure with new supporting elements. A supervisor-based tree uses the supervisor ID on the Job record to determine who works for whom. The supervisor ID on the Job record captures only a reporting employee ID, but not the full job specification. The system attempts to resolve a manager's multiple jobs using alternate matching criteria.

These rules apply to both supervisor-based trees and position-based trees:

- All employees must belong to the same business unit.
- The employee's department must match the manager's department.
- The manager's department does not have to match the department of their manager.
- An employee can only be on a tree once unless they are a manager.
- A manager can only appear once on a branch.

The system uses a series of programs written to a standard interface to build the various hierarchies and navigational methods that are tied to the trees. Each program encapsulates the fixed supporting elements needed to expand a specific hierarchy's data model into a tree. The selection of a hierarchy method is a setup item on the Tree Builder Run Control page.

Once you create a tree using PeopleTools, do not change the tree structure. If you change the structure, you will not be able to use the existing run control or tree name to build additional trees. The system skips the steps used to build the new tree and displays a message if you change the structure and the tree has already been built.

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**Note:** The PeopleSoft eCompensation Manager Desktop application can support the use of department trees. However, using department-based trees has some unexpected results that you should be aware of. For example, the manager of a department will also be listed with his or her own direct reports in a department-based tree structure. This causes issues when proposals are submitted and the higher level manager cannot enter proposals for the manager in the *submitted* node. Although the use of department-based trees is available, it is our recommendation that you use the supervisor or position based trees to administer compensation cycles.

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See [Building Trees](#).

The Tree Builder Application Engine then instantiates the applicable class, whose primary function is the building of the tree. Since the indirect hierarchies specified by PeopleSoft HCM data models are not validated or enforced, the Tree Builder makes an attempt to navigate the hierarchy top-down and record the reporting relationships in the tree. Anyone (or any group) who lacks an appropriate relational linkage, or whose linkage is ambiguous, non-resolvable, or inactive, is omitted from the tree.

In this scenario the Tree Builder only provides assistance in turning a hierarchy into a tree. You must manually maintain and validate all subsequent tree maintenance within the PeopleTools Tree Manager application. The tree-building activity, if used, is entirely unrelated to and separate from the compensation cycle.

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**Note:** Trees that have been created using Tree Builder should not be modified in such a way that the Tree Manager's structure is altered. These actions may cause unexpected results during the Cycle Build process. It is our recommendation that you create new trees and attach them to the compensation cycle.

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See Also *PeopleTools: PeopleSoft Tree Manager*

## Related Links

"Creating and Modifying Security Trees (*PeopleSoft HCM 9.2: Application Fundamentals*)"

## When Employees are Not Associated to Trees

If an employee cannot be associated to any of the tree nodes based on the hierarchical basis value that is set by the user, the employee is placed into a default node called *Comp Admin Group*. For example there could be employees that have department IDs other than any of those found in the tree.

Because the selection criteria for the Tree Creation process and the Group Build process could be different, there is an implied connection via the hierarchical basis value.

The assumption is that the user is aware of the relationship between the two processes and has made efforts to ensure that they are both compatible. This may not always be the case, however:

- The selection criteria for the population may be too broad and pick up more employees than expected.
- The tree structure that has been defined may not have all of the appropriate nodes that were expected to be included.
- There is bad or incorrect data in either the organization or employee's attributes that causes a mismatch.
- The employee being processed resides at the root node of the tree

The Compensation Cycle Build process highlights these potential data anomalies by creating a special node and labeling it as a *Comp Admin Group*. This node is positioned so it reports directly to the root node. This enables the compensation administrator associated to the root node to view it as part of their setup and administrative activities.

For example, if the root node represented the president of the company, that person will then have access to update his or her own data. Therefore, the president is assigned to the *Comp Admin Group* and can be managed directly by the compensation administrator. The compensation administrator will have access to this node and will be able to determine if adjustments need to be made to the tree or if they will personally manage the employees that were placed in this node.

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## Salary Plans in Compensation Cycles

The compensation cycle in eCompensation Manager Desktop enables you to manage salary increases like annual merit increases and other forms of compensation.

On the Compensation Cycle Definition – Salary page you can define the salary plan parameters that will be used to calculate funding for salary increases. You can specify the funding percent, minimum and maximum percents allowed, and whether the funding amount calculated should be defaulted as the

employee's proposed increase. You can also specify rounding and proration rules for your salary plan along with the increase date and action reason combination that the system will use when it applies the salary increase to the employee's Job and Compensation record.

For more complex funding calculations, you can implement a configurable matrix to derive the funding calculation based on factors like the employee's performance rating, salary plan, location, and department.

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## Configurable Matrices

This section discusses:

- How the configurable matrix is used.
- Matrix Types specific to eCompensation Manager Desktop.

### How the Configurable Matrix is Used

A configurable matrix is a special type of lookup table that can be designed and populated by the administrator. The administrator specifies the inputs (or criteria) that are used as lookup variables and the outputs (or results) that the table returns for specific combinations of input values.

The guidelines that control a manager's salary actions are configured to support a wide range of business practices. Both base compensation and variable compensation may require flexibility in their funding, baseline, and validation rules. The configurable matrix is used to achieve this requirement. Within PeopleSoft eCompensation Manager Desktop, the Salary Increase Matrix is used for salary planning purposes.

### Matrix Types Specific to eCompensation Manager Desktop

To avoid confusion with existing usage, PeopleSoft created this additional matrix type to support the salary plans associated with compensation cycles:

#### BASECOMP - Base Compensation Adjustments

For example, a Base Compensation Adjustments configurable matrix could have with inputs equal to the business unit source ID and outputs equal to the funding percentage, minimum percentage, and maximum percentage. In this example the output content could equal 4, 1, and 10 respectively.

In addition PeopleSoft has defined several new *simple* results. The system links the matrices into the cycle process through the eCompensation Cycle Plans setup table, which defines the salary plans included in the cycle. The system uses the matrices primarily during the Cycle Build process. During this process, the system produces the funding calculations.

The matrix is also used for validation of a manager's recommended entries against the minimum and maximum.

The system supports these result types and outputs:

<b>Result Type</b>	<b>Output Description</b>
BASECOMP	Funding Percentage



<b>Result Type</b>	<b>Output Description</b>
BASECOMP	Minimum Percentage
BASECOMP	Maximum Percentage

### Related Links

"Understanding Configurable Matrices (*PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting*)"

---

## Variable Compensation Plans

The PeopleSoft HR Manage Variable Compensation business process enables you to create and manage multiple variable compensation plans. These plans can encompass everything from onetime ad hoc awards to stock options, bonus plans, non-cash incentives, and holiday gifts or bonuses.

Variable Compensation plans can be simple or complex based upon prorated eligibility, goal levels, funding allocations, smoothing mechanisms, and approval processing.

You have the flexibility to create variable compensation plans that support your organization. To add a Variable Compensation plan, you must define a salary plan before you define your compensation cycle. The new Compensation Cycle functionality does not change the configuration of Variable Compensations plans.

Using compensation cycles to adjust employee salaries can help you effectively manage your compensation information, adjusting employee salaries as changes are processed. Compensation cycles also involve other variable compensation awards.

On the Compensation Cycle Definition - Awards page you can associate a Variable Compensation plan to your Compensation Cycle definition. The system provides complete configuration and award calculations for PeopleSoft Variable Compensation.

### Related Links

"Understanding Variable Compensation Plan Types (*PeopleSoft HCM 9.2: Human Resources Manage Variable Compensation*)"

[Administer Cycle Page](#)

---

## Approval Transaction Configuration

This section discusses:

- Approval transactions.
- Route for approval events.
- Email templates.

---

**Note:** You can configure approval transactions, events, email templates, and registry using the Approval Workflow Engine (AWE) components and pages. If you use the AWE framework for approvals for the compensation cycle you must configure it for each cycle. Approval transactions, approval events, and email templates are configured at the cycle level and do not apply to all compensation cycles. The setup and configuration of AWE is not required, however. eCompensation Desktop Manager works as designed by providing a rollup submission of nodes that implement a form of implied approval. This rollup follows the access roles as they are defined in the system.

---

## Related Links

"Understanding Approvals (*PeopleSoft HCM 9.2: Application Fundamentals*)"

## Approval Transactions

eCompensation Manager Desktop uses the Configure Transactions component to select and define elements that determine what triggers a notification, who receives the notification, and the content of the notification. Notifications are mapped to work with the approval transaction registry and include menus and components and SQL definitions.

The events for which the system sends notifications include:

- Launch of the approval process on a transaction.
- Queue of approval step to an approver.
- Queue of a review step to a reviewer.
- Completion of the approval process.

---

**Note:** The launch of the approval process occurs when the compensation proposal for a group is submitted by a user when they click the Submit button.

---

## Route for Approval Events

When the approval process is initiated, after submitting the compensation information for the cycle, the system evaluates the next step in the approval process. To route it to the next approver in line, you need to instantiate the Route for Approval event (select Set Up HCM, Common Definitions, Approvals, Configure Transactions).

Among the tasks that are completed internally with this event, some notifications need to be sent to the next approver in line to indicate that a request is waiting for approval.

PeopleSoft eCompensation Manager Desktop delivers a process ID (*ApproveCompensationProposals*), definition IDs, and email templates as part of the setup for Route for Approval.

Here is the Configure Transactions page that you would use to route approvals to requesters, approvers, and reviewers.

### Image: Configure Transactions page

This example illustrates the fields and controls on the Configure Transactions page.

**Configure Transactions**

Process ID ApproveCompensationProposals

**Ad Hoc Approver Options**

\*Approval User Info View WCS\_APRV\_USR\_VW

Ad Hoc User List

**User Utilities**

User Utilities Package HCSC\_USER\_UTILITIES

User Utilities Path UserUtilities

**Events** Find | View All First 1 of 3 Last

\*Event On Final Approval \*Level Header

Menu Name ROLE\_MANAGER

Approval Component WCS\_ECM\_AWE\_HOME

Page Name

Menu Action Update

SQL Object Identifier WCS\_APPR\_EML\_BIND

**Notifications** Personalize | Find | View All First 1 of 1 Last

Main | Template Details | Frequency

*Participant	Channel	User List	Template Name
1 Requester	Both		WCS_APPR_APPROVED

See "Configuring Approval Transactions (*PeopleSoft HCM 9.2: Application Fundamentals*)".

## Email Templates

Clicking the Submit button from the Manager Self-Service - Manage Cycle Transactions page launches the Approval Workflow Engine (AWE) and initiates the approval process. Workflow tables track who initiated the request and who is the next approver. The system also submits the compensation information for approval and triggers the respective email notifications that were setup in AWE.

Clicking the Submit button also sets the status of the cycle to *Submitted*. After a transaction has been submitted, a user cannot edit the transaction. An event can be resubmitted only if the approver denies the transaction or after the next approver in line has clicked the Push Back button to send it back to the requestor or originator.

If you set up the notification process within AWE, the original submitter receives an email notification. Recipients of notifications include requesters, approvers, and reviewers. These users can receive their notifications through either worklist entries or by email notification. The PeopleSoft eCompensation Desktop Manager application provides several templates (template name begins with *WCS\_*) for specific

AWE events that you can modify for your own specific use. To modify email templates select Set Up HCM, Common Definitions, Approvals, Generic Templates.

Here is the suggested text for the email template:

<b>Generic Template Definition Field</b>	<b>Text</b>
Subject	Your Compensation Recommendation was submitted
Message Text	<p>The following request has been submitted by %5. This request requires your approval before the compensation proposals can be confirmed.</p> <p>Submitted Request Cycle: %2</p> <p>Begin Date: %3</p> <p>Group: %4</p> <p>Please visit the following URL for detailed information about the request: %1</p> <p>This communication was sent via Oracle Workflow Technology. Please do not reply to this email.</p>
Template Variables	<p>%1 URL (provided by AWE)</p> <p>%2 Cycle</p> <p>%3 Begin Date</p> <p>%4 Group</p> <p>%5 Originator Name</p>

---

**Note:** AWE automatically creates the URL when the system sends the notification.

---

Here is an example of the Generic Template Definition page that you can use on the Configure Transaction page to route approvals to requesters, approvers, and reviewers:

### Image: Generic Template Definition page

This example illustrates the fields and controls on the Generic Template Definition page.

Generic Template Definition

Blackberry Email Responses

Template:

WCS\_APPR\_APPROVAL\_REQ

\*Description:

Compensation Pending Approval

Instructional Text:

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of

Priority:

2-Medium

\*Sender:

User

Email ID:

Subject:

Compensation Proposals Pending Approval

Message Text:

The following request has been submitted by %5. This request requires your approval before the compensation proposals can be confirmed.

Submitted Request  
Cycle: %2  
Begin Date: %3  
Group: %4

Below is the list of available variables for this template.

You can use template variables within your subject or message text.

The following variables can also be used:

%Date, %DateTime, %Time, %ServerTimeZone, %EmailAddress, %NotificationPriority, %NotificationToList, %NotificationCCList

Template Variables

*Value	*Description		
%1	URL (provided by AWE)	+	-
%2	Cycle	+	-
%3	Begin Date	+	-
%4	Group	+	-
%5	Originator Name	+	-

**Note:** The eCompensation Manager Desktop application delivers the Compensation Pending Approval template (WCS\_APPR\_APPROVAL\_REQ).

See "Defining Notification Templates for Approvals (*PeopleSoft HCM 9.2: Application Fundamentals*)".

---

## Compensation Cycles

A compensation cycle defines the compensation activity and associated time period. The cycle ID and funding period are used as key fields throughout the process to identify unique cycles.

This section discusses:

- Administering the Compensation process.
- Cycle statuses.
- Group statuses.
- Proposal statuses.

### Administering the Compensation Process

The administrative functions within eCompensation Manager Desktop's enable you to establish plans, define processes, and manage the compensation process for your organization. These functions encompass the activities that a compensation administrator would need to complete to configure the self-service component that managers use to review and enter compensation information.

Compensation administrators use these functions to configure the eCompensation Manager Desktop application:

- Compensation Cycle Definition

Use the pages within this component to define your compensation cycles and associated provisions for both salary and award processing. Here are the types of parameters that comprise a compensation cycle definition:

- What group of employees will be processed?
- What tree hierarchy will be used to group employees for processing and approvals?
- Will performance ratings be integrated into the Compensation Cycle process?
- What Salary Plan rules will be used for calculating funding and processing salary increases?
  - Will a configurable matrix be used to derive the funding percentage?
  - What rounding rules will be in effect?
  - What proration rules will be in effect?
- What Variable Compensation rules will be used for calculating funding and processing bonuses and awards?
  - Will funding be defaulted from Variable Compensation or manually funded?
  - What rounding rules will be in effect?
- What specific fields of information need to be displayed on the Manager Self-Service pages?

- What type of approval process will be used?

- **Cycle Administration**

Use the pages within this component to manage the major events during a compensation cycle. This component provides the event steps and prompts for the activities that need to be completed throughout the compensation cycle. You can also use this component to build your compensation cycles to prepare employees and calculate funding, open cycles to managers to enter proposals, load approved salary updates and awards, finalize compensation cycles, or cancel cycles to adjust the configuration and rebuild the cycles.

- **Cycle Role Management**

The pages within this component enable the compensation administrator and designated administrators to update group node role access for the organization tree hierarchy defined for your compensation cycle. For each group node, an employee ID and employee record number can be assigned a specific access role (Submitter, Reviewer, Confirmer, and so on) that provides access to view, update, and approve salary and award proposals.

- **Plan Funding**

Use the pages within these components to provide a summary of all cycle funding within each organizational group. Through this functionality you can view and update funding based on the provisions of the cycle definition and the processing status within the cycle. You can also manually distribute funding.

- **Transaction Management**

Use the pages within this component to detail the calculated compensation proposals for organizational groups and funding basis. Compensation administrators may update proposals at either the group or individual level at any time after the cycle has been released for manager entry. This component also features group and individual view capabilities. At the individual level users can view compensation history.

## Cycle Statuses

The Cycle Status is used by the compensation administrator to evaluate where the cycle stands at any time during the process. This status is directly linked to the Compensation Administration component that is used to move the cycle through various steps and processes. This display fields communicate the status of the cycle and the person responsible for setting that status in motion.

During cycle definition (and prior to running the Cycle Build process) the status of the cycle equals *Defined*. The As of date and Last Processed By fields represent the last edit date and operator ID. As each activity is completed, the system updates the status accordingly.

<b>Cycle Status</b>	<b>As of Date</b>	<b>Last Processed By</b>
Defined	Last edit date of the Compensation Cycle definition.	Displays the ID of the last user to edit the cycle definition.
Canceled	Date of action.	Displays the ID of the user who executed the cancel cycle.

<b>Cycle Status</b>	<b>As of Date</b>	<b>Last Processed By</b>
Build in Progress	Last run date for Cycle Build process.	Displays the ID of the last user who ran the Build/Calculation process while in the <i>Build In Process</i> status.
Built	Last run date for Cycle Build process.	Displays the ID of the last user who ran the Build/Calculation process to the <i>Complete</i> status.
Open	Date of action.	Displays the ID of the user who executed an approve funding action.
Finalized	Date of action.	Displays the ID of the user who executed the finalize cycle.

## Group Statuses

The Group Status is used to identify where each group (or reporting node) is within the compensation cycle. This is the primary status indicator used during manager self-service to track compensation proposals.

<b>Group Status</b>	<b>As of Date</b>
Calculated	Last run date of Cycle Build process.
In Progress	Date of action.
Submitted	Date of action.
Approved	Date of action.
Pushed Back	Date of action.
<b>Note:</b> If you have implemented the AWE framework, the user is the AWE itself.	
Ready to Load	Date of action.
Complete	Last run date of Load Salary and Award Update process.

## Proposal Statuses

The Proposal Status code is used to indicate whether the approved updates and awards have been loaded successfully for an individual within one or more of the plans with a *Ready to Load* group status. The system only updates the status from the *Pending* status following the Load Salary Updates and Awards process.

<b>Proposal Status</b>	<b>As of Date</b>
Pending	Last run date of Load Salary and Award Update process.
Load Error	Last run date of Load Salary and Award Update process.
Bypassed	Last run date of Load Salary and Award Update process.



<b>Proposal Status</b>	<b>As of Date</b>
Processed	Last run date of Load Salary and Award Update process.

See Also [Understanding the Cycle Load Process](#)

## Security Considerations

Access to the Manager Self-Service component is controlled through standard PeopleSoft security. The system uses PeopleCode to determine whether the current user has the credentials to access the component. This is necessary because URLs can be distributed, copied and modified to invoke the component directly, even though no direct portal access exists.

Access to a specific compensation cycle is dependent upon the cycle status together with information residing in the Cycle Role Access table. The Cycle Role Access table retains role access security to a specific group node in your organizational tree hierarchy. Depending upon the role access, the user may have the proper credentials to review, update, or approve proposals.

This table outlines the criteria the system uses to provide access to the pages within the Manager Self-Service component.

<b>Cycle Status</b>	<b>Workforce Compensation Solutions (WCS) Role</b>	<b>Manager Self-Service Access Allowed?</b>
Defined	All	No
Build in Progress	All	No
Built	Manager Approver Reviewer	No
Cancelled	Manager Approver Reviewer	No
Open	Manager Approver Reviewer	Yes
Finalized	Manager Approver Reviewer	No  <b>Note:</b> If the current date, however, is between the Open to Manager Review date range, the system will allow users to have access.

## Compensation Alerts

eCompensation Desktop Manager alerts are limited to compensation events that are specifically related to the Compensation Cycle business process. There are three primary areas where changes are of interest to managers who need to make and submit proposals:

- Changes to the compensation cycle status that determine the state of the entire business process.
- Changes to the manager's group status that describe the point of completion in the compensation cycle.
- Changes to the access roles that identify the role or responsibility of the individual manager within the business process.

Compensation alert messages are generated by compensation administrators, senior managers, line managers, and compensation processes after certain activities are performed. An alert is simply a message logged during the process, which can be viewed and acted upon by a participant when a manager accesses the Allocate Compensation page.

The system displays an alert entry with basic information such as a task name, a task description, or other instructional text. It can also include an attachment.

The Component's Event Framework provides the content the actual message that is displayed to the user. In this common publish-subscribe scenario, the event is the published message, which indicates that something of interest occurred. This is important as an event may have many subscribers and many recipients. The subscription process is contained within the management (creation, update and deletion) of the compensation alert messages.

**Note:** The system does not deliver direct manager component access through the portal navigation tree outside of the manager's home page.

## Document and Link Configuration

The HCM Attachment Framework is a flexible and user-friendly component for integrating document and link management for specific application areas. Using the pages included in the Attachments component, you can make documents or links context-sensitive and provide security based on standard PeopleSoft roles, permissions, and data values in HCM.

Here is how the system displays the Attachments group box to users in Manager Self Service:

### Image: Attachments group box

This example illustrates the fields and controls of the Attachments group box displayed in pages.

Attachments					
File Name	Description	Attachment Audience	Last Update Date/Time	Uploaded By	
Goals_2012.doc	Goals of 2012	Manager Only	10/29/2012 2:48:22PM	Betty Locherty	

Because the implementation of the Attachment Framework depends on a predefined set of keys, PeopleSoft has delivered system data that specifies the key structure for Compensation Alert documents.

On the Configure Keys page the *HWCS* object owner ID and *ALRT* sub ID define the application that has been implemented for use.

---

**Note:** eCompensation Desktop Manager has not implemented the ability for users to add or update existing documents. All documents must be defined and loaded by the compensation administrator using the Attachment pages. Therefore, stored attachment documents are displayed as read-only to the user.

---

Located in the Attachments folder, the Define Attachments page (select Set Up HCM, Common Definitions, Attachments) allows you to specify a configuration for each document or link. To simplify this concept, think of a configuration as the system's identifier for a defined document target. The term *attachment* includes both documents and links. The term *configuration* refers to many types of files, including Word documents, Excel spreadsheets, PDF files, or links to internal or external websites. The configuration provides the details regarding the intended target including a complete definition, a status, and the type or form of attachment. More importantly, it stores the actual document or link and the PeopleSoft roles that are allowed access to it.

On the Define Attachments page, PeopleSoft recommends that you use the same ID to set up both the attachment configuration and the compensation cycle ID. Although this is not required, it is beneficial to use the compensation cycle ID as the key identifier for the attachment. For example, if you have an annual merit cycle called *2012 Focal*, a configuration ID of *2012 FOCAL* allows you to quickly identify the attachment that is associated to that particular compensation cycle. This can be helpful if you are administering many compensation cycles that need their own attachments. In addition, the effective date enables you to create multiple versions of the same document over time for the same configuration.

To attach a document or URL to an alert, select Set Up HCM, Common Definitions, Attachments, Define Attachments. On the Define Attachments page select *WCS\_ALERT* as the configuration ID. You can then change the instructional text, or add an attachment and URL. In addition you can select the roles to which the system will display the alert and attachment or URL.

Here is an example of the Define Attachments page for compensation instructions using the *WCS\_ALERT* configuration ID:

#### Image: Define Attachments page

This example illustrates the fields and controls on the Define Attachments page.

**Define Attachments**

Configuration ID: **WCS\_ALERT**

**Attachment Configuration Details** Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1990 \*Effective Status: Active

\*Description: Compensation Instructions Short Description: WCS\_ALERT

Comments: Compensation Instructions for Managers with Proposals

\*Attachment Type: Attachment

Attachment: SAMPLE\_MARKET\_PAY.PDF View Attachment Delete Attachment

**Authorized Roles** Personalize | Find | View All | First 1 of 1 Last

*Role Name	Description
1 Manager	Manager

Last Upd User: SAMPLE Updated on: 06/12/09 11:45:15AM

The Maintain Definitions page enables you to set up context-sensitivity for each attachment configuration. It is the combination of two key values – Compensation Cycle ID and Event Code – that

enable you to define the scope of the document's availability to the end user. You can set up the context keys in any combination, including a blank value that means *any*. The key values prompt against the Compensation Cycle Configuration and Compensation Alert Setup tables for selection. The system performs no specific validation as the combination of the two keys (including the effective date) will typically result in a found attachment.

---

**Note:** At a minimum, the event code should be specified; otherwise all alerts (regardless of event code) could potentially retrieve the same attachment configuration. The system attempts to locate and retrieve the configuration for an attachment when a user attempts to access the Allocate Compensation page (select Manager Self Service, Compensation and Stock, Allocate Compensation). If the system finds a valid attachment, it displays the Info column and a link in the form of an icon. Conversely, if the system does not locate a attachment for any of the alert messages listed in the grid, it hides the column. When the user clicks the Info icon, the system opens a new browser window and displays the associated document.

---

## Related Links

"Configuring Attachments (*PeopleSoft HCM 9.2: Application Fundamentals*)"

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## Common Elements Used in eCompensation Manager Desktop

<b>Compensation Cycle</b>	Compensation activity that is established for a specific period of time (for example, annual merit increase).
<b>Salary Plan</b>	Salary plans represent individual compensation programs such as merit increases, optional increases, bonuses, or incentive stock options and include specific qualifications and funding.
<b>Variable Compensation</b>	Business process that is set up in PeopleSoft HCM. It enables you to create and manage multiple variable compensation plans. These plans can encompass everything from onetime ad hoc awards to stock options, bonus plans, non-cash incentives, holiday gifts, bonuses, and more.
<b>Cycle Status</b>	The status maintained on the Compensation Cycle definition. These high level values are used with compensation cycles: <i>Defined, Building, Built, Open, and Finalized</i> .
<b>Group Node</b>	Based on the tree hierarchy defined on your compensation cycle, employees are assigned to a specific node on the tree. This is referred to as the group node. For each group node, direct and indirect report funding information is maintained, as well as the employee proposals. In addition, role access is also assigned at the group node level to control who has the ability to submit, review, and confirm or approval of the proposals for that group.
<b>Group Node Status</b>	A status is maintained for each group node. These values are used for group nodes: <i>Calculated, In Progress, Submitted, Pushed Back, Confirmed, Ready to Load, Completed, and Completed with Errors</i> .

<b>Employee Proposal Status</b>	The system maintains a status for each employee proposal. These values are used with employee proposals: <i>Pending</i> , <i>Bypass</i> , <i>Load Error</i> , and <i>Processed</i> .
<b>Access Role</b>	A role assigned to an employee for a specific group node. The role controls the access and action that can be performed by the employee. These values are used with access roles: <i>Compensation Administrator</i> , <i>Submitter</i> , <i>Reviewer</i> , and <i>Confirmer</i> .
<b>Compensation Administrator</b>	Access role that manages and monitors the status of the compensation cycle.  This role is defaulted to the root node of the tree hierarchy. The person having this role gives them the ability to review and monitor all group nodes. This access role also enables the person to update the group node status to <i>Ready to Load</i> .
<b>Submitter</b>	Access role assigned to a group node that enables an employee to enter proposals for salary changes and awards, then submit those changes to be confirmed or approved by the person with the Confirmer or AWE Approver role.
<b>Reviewer</b>	Access role assigned to a group node that enables an employee to review proposals. The system does not allow employees with the Reviewer role to change or submit proposals for a group node.
<b>Confirmer</b>	Access role assigned to a group node that enables an employee to confirm salary change and award proposals for a group node.
<b>AWE Approver</b>	If you are using the Approval Workflow Engine, this is the derived approver that is defined within that approval framework. It is <i>not</i> the same as the Confirmer access role that is assigned to a group node within the eCompensation Manager Desktop application.



# Setting Up and Implementing Compensation Cycles

## Building Trees

This section discusses how to build trees using the Tree Builder Utility run control page.

### Page Used to Build Trees

Page Name	Definition Name	Navigation	Usage
Tree Builder Utility	HCSC_TREEBLD_RNCTL	Set Up HCM, Product Related, Compensation, Utilities, Tree Builder Utility, Tree Builder Utility	Build trees for your eCompensation Manager Desktop application.

### Tree Builder Utility Page

Use the Tree Builder Utility page (HCSC\_TREEBLD\_RNCTL) to build trees for your eCompensation Manager Desktop application.

#### Navigation

Set Up HCM, Product Related, Compensation, Utilities, Tree Builder Utility, Tree Builder Utility

#### Image: Tree Builder Utility page

This example illustrates the fields and controls on the Tree Builder Utility page.

Tree Builder Utility

Run Control ID COMP\_SUP\_TREE Report Manager Process Monitor Run

Hierarchy and Tree Setup

\*Hierarchy Basis Supervisor ID

Tree Structure ID SUPERVISOR\_ID

Relationship View WCS\_SPRVSRID\_VW

Set ID

\*Tree Name SUPERVISOR\_CHAIN

\*Effective Date of Tree 01/01/2012

\*Description Supervisor Report Chain

\*Category STOCK ADMIN

Existing tree will be replaced

Top Value on Tree

\*Employee ID 0002

\*Employment Record 0

Root Value

Once you create a tree using PeopleTools, do not change the tree structure. If you change the structure, you will not be able to use the existing run control or tree name to build additional trees. The system skips the steps used to build the new tree and displays a message if you change the structure and the tree has already been built.

### Hierarchy Basis

Select a hierarchy structure.

---

**Note:** You cannot select *Department Tree* as the hierarchy basis because PeopleSoft HCM does not have a data model which supports the dynamic building of a department chain. You must create the department tree manually using PeopleSoft Tree Manager.

---

See *PeopleTools: PeopleSoft Tree Manager*.

### Set ID

Select the set ID that you want to use for the tree you are building.

---

**Note:** To activate this field, select Tree Manager, Tree Structure. Select *SUPERVISOR\_ID*. and click the Search button. Select the Setid Indirection radio button that appears in the Additional Key Field group box. Click Save. Return to this page and select *Supervisor ID* as the hierarchy basis. The Set ID field is now available for edit. Fill in the remaining fields and then click Run. Select Tree Manager, Tree Viewer to confirm that the system created the tree.

---

### Tree Name

Enter the name of the tree that you are building.

### Effective Date of Tree

Select or enter the date that the tree will become effective.

### Description

Enter a description for the tree.

### Category

Select or enter a category for the tree you are building.

### Existing tree-will be replaced

This field is set by the system. If you do not want to replace the tree, you must change one of the key fields (Set ID, Tree Name, or Effective Date of Tree). Otherwise, the system will replace an existing tree that you or someone else in your organization created with the same key values.

## Top Value on Tree

You must specify at what point in the hierarchy the tree should start. This is often referred to as the *root* node. For many organizational hierarchies this is a simple entity key, such as department ID or position number. For employee-based hierarchies (like supervisor) this represents a specific manager and job. Because of this variability, the entry of the root value is managed by the system based on the hierarchy basis you select.

### Employee ID

Select the ID of employee from where you want the tree structure to start.



**Employment Record**

Select the employee record number from where you want the tree structure to start.

**Root Value**

Enter a root value only if you are using a tree that is *not* based on the employee ID, like a position-based tree. In this case, the system disables the employee ID fields.

---

## Setting Up Prorate and Rounding Rules

This section provides an understanding section on rounding rules and proration calculation and discusses how to:

- Define rounding rules.
- Define prorate rules.

### Pages Used to Define Prorate and Rounding Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Rounding Rules	WCS_ROUND_TBL	Set Up HCM, Product Related, Compensation, Compensation Processes, Define Rounding Rules, Define Rounding Rules	Set up rounding rules to determine calculated funding amounts for funding adjustments and proposed amounts for variable compensation and salary plans.
Define Prorate Rules	WCS_PRORATE_TBL	Set Up HCM, Product Related, Compensation, Compensation Processes, Define Prorate Rules, Define Prorate Rules	Set up rules for proration analysis and factor calculation.

### Understanding the Use of Rounding Rules

This section discusses:

- Multiple Currencies
- Rounding approach
- Decimal precision

#### Multiple Currencies

eCompensation Manager Desktop has the capability to handle multiple currencies. This allows managers to view data and submit pay and bonus recommendations in their local currencies. However, for the system to manage to an overall budget, amounts entered in a currency that is different than the base currency that is used for budget purposes are converted to the base currency for the funding process (defined in the cycle definition) and stored in that base currency.

When these amounts are needed for display in a currency other than the base currency, the system converts the stored amount to the needed paid currency. All currency conversion is based on PeopleSoft-delivered currency conversion functionality.

## Rounding Approach

Another configurable aspect of eCompensation Manager Desktop is the ability for the system to round input amounts to user-defined increments, or accept them in increments of .01. These increments can be defined by currency.

The rounding rule is applied uniformly throughout the application at a number of critical spots in the process:

- During the budget build process rounding rules apply to calculated funding amounts for variable compensation and salary plans.
- During the funding adjustment phase any employee-level funding adjustments input by the compensation administrator need to be rounded in accordance with the appropriate rule.
- During the manager self-service phase proposed values need to be rounded in accordance with the appropriate rule.
- During the load process posted proposed amounts are rounded in accordance with the appropriate rule.

Rounding takes place by plan against the proposed values (for example, merit increases are calculated separately from promotions). For example, Japan (JPY) values may be rounded to increments of 100.00 while South Korean (KRW) values may be rounded to increments of 500. Rounding rules are defined for salary and monetary variable compensation plans separately, which are defined in the cycle definition.

In the case of salary values, there is an underlying assumption that the current base salary amount is properly rounded. The Cycle Build process automatically rounds annual rates to 2 decimal places for calculation purposes.

For example, if values are rounded to the nearest 1.00, a funded percentage of 3 percent on a base salary of 35,122.00 JPY would be 1053.66 JPY. In this case the system would round the funded amount to 1,054 JPY. If the starting base salary was 35,122.00 JPY, the new base salary would be 36,176.00 JPY not 36,175.66 JPY.

<b><i>Rounding Rule</i></b>	<b><i>Starting Base Salary</i></b>	<b><i>Funding Percentage</i></b>	<b><i>Rounded Value</i></b>	<b><i>New Base Salary</i></b>
Nearest 1.00	35,122.00	3 percent	1,054	$35,122.00 + 1,054 = 36,176.00$

Rounding takes place based on the paid currency of the individual. This means that values viewed in a currency other than the paid currency of the employee may not appear as a rounded value.

## Decimal Precision

For employees populations with different currencies decimal precision is important in the rounding function. Because funding and proposal amounts are calculated and rounded in their base currency, and are stored in the planning currency in the compensation cycle processing tables, employee populations with mixed currency codes can cause incremental balance issues during conversion.

Without decimal precision, the proposal amount might not post the correct rounded proposal amount. All proposal amounts on summary pages in PeopleSoft eCompensation Manager Desktop are displayed with 2 decimal points despite the fact that some funding and proposal amounts on certain pages can contain up to 6 decimal places. Funding and proposal amounts calculated and entered for employees with different currencies will properly update the organizational funding summaries.

## Understanding Proration Calculation Rules

PeopleSoft eCompensation Desktop Manager enables you to configure proration rules to suit your business needs. A prorate rule is used to apply a formula to calculate a percent value that represents the employee's eligibility for the compensation cycle. A proration factor of 1.00 would signify that the employee is eligible for the entire period. This proration factor is applied to adjust the calculated funding amounts during the build process. On the Compensation Cycle Definition – Salary page you enter the following information:

1. Earliest eligible start date.
2. Full period start date.
3. Eligible end date.

See [Administer Cycle Page](#).

The system calculates the proration factor by reviewing the employee's job history for the eligible period and accumulating the number of periods that meet the specified proration rule formula.

<b>Period</b>	<b>Description</b>
Eligible Period	The time between the Earliest Eligible Start Date (1) and the Eligible End Date (3) that a person is eligible.
Full Period	The time between Full Period Start Date (2) and Eligible End Date (3).

The maximum prorate factor is the time from the Eligible Period divided by the Full Period. If the Earliest Eligible Start Date is the same as Full Period Start Date then the prorate factor is 1.0000. If the Earliest Eligible Start Date is prior to the Full Period Start Date then the prorate factor can be greater than 1.0000.

For example, a typical merit cycle might be from 1/1/2009 to 12/31/2009 (12 months) with a hire cutoff date of 10/1/2008.

This cycle would calculate the prorate factor from 10/1/2008 through 12/31/2009 (15 months), giving those that were hired before the normal cycle (12 months) a prorate factor of up to 1.25 (15 months / 12 months = 1.25) to make up for the time they worked in addition to the typical merit cycle.

---

**Note:** To highlight employees who have a proration factor greater than 1, the system displays a warning message which is written to the WCS Message Log table and to the log file during build processing.

---

## Define Rounding Rules Page

Use the Define Rounding Rules page (WCS\_ROUND\_TBL) to set up rounding rules to determine calculated funding amounts for funding adjustments and proposed amounts for variable compensation and salary plans.

## Navigation

Set Up HCM, Product Related, Compensation, Compensation Processes, Define Rounding Rules, Define Rounding Rules

### Image: Define Rounding Rules page

This example illustrates the fields and controls on the Define Rounding Rules page.

**Define Rounding Rules**

Rounding Rule HXCMP2

\*Description QA Rounding Rule 2

Notes

**Rounding Rules** View All First 1 of 1 Last

\*Effective Date 01/01/1900

**Rounding Rule Parameters**

\*Rounding Method Nearest \*Rounding Increment 1.000000

**Currency Specific Rules** Personalize View All First 1-5 of 6 Last

*Currency Code	Description	*Rounding Increment
AUD	Australian Dollar	50.000000
EUR	euro	100.000000
GBP	Pound Sterling	100.000000
INR	Indian Rupee	50.000000
JPY	Yen	50.000000

### Rounding Rule

Identifies the rounding rule. You enter the characters in this field in the Add mode before you access the page. The maximum length is six characters.

## Rounding Rules

### Effective Date

Select or enter the date the rule becomes effective.

## Rounding Rule Parameters

### Rounding Method

Select one of these values to indicate the method with which the system should round values that are input and calculated:

- *Down*
- *Nearest*
- *None*
- *Up*

**Rounding Increment**

Enter the increment by which you want the system to round input amounts. Rounding increments must be *1000, 500, 100, 50, 10, 5, 1, 0.1, or 0.01*.

**Currency Specific Rules****Currency Code**

Select the currency for which you want to apply the rounding rule. The system displays the description to the right of the currency.

**Rounding Increment**

Enter the rounding increment that you want the system to use for the corresponding currency. Rounding increments must be *1000,500,100,50,10,5,1,0.1, or 0.01*.

**Define Prorate Rules Page**

Use the Define Prorate Rules page (WCS\_PRORATE\_TBL) to set up rules for proration analysis and factor calculation.

**Navigation**

Set Up HCM, Product Related, Compensation, Compensation Processes, Define Prorate Rules, Define Prorate Rules

**Image: Define Prorate Rules page**

This example illustrates the fields and controls on the Define Prorate Rules page.

**Define Prorate Rules**

Proration Rule: HXCMP1  
 \*Description: QA Proration Rule 1  
 Notes:

**Prorate Rules** ? View All First 1 of 1 Last

\*Effective Date: 01/01/1900 \*Frequency: Daily  
 Date Indicator: Day of the Month:

**Prorate Rule Parameters** ?

☐ Include Temporary Time ☒ Last Increase Date  
☐ Include Part Time ☒ Last Hire Date  
 Weekly Minimum Standard Hours: 0.00

**Eligible Payroll Statuses** Personalize | View All | 1-4 of 4

*Payroll Status	
Active	+ -
Leave With Pay	+ -
Retired With Pay	+ -
Terminated With Pay	+ -

**Restart Eligibility Date Action Reasons** ? Personalize | View All | 1 of 1 Last

*Action	Action Description	*Reason	Description
PRO	Promotion	NCP	Normal Career Progression

**Proration Rule**

Identifies the proration rule. You enter the characters in this field in the Add mode before you access the page. The maximum length is six characters.

## Prorate Rules

### Effective Date

Select or enter the date the rule becomes effective.

### Frequency

Select one of these values to indicate the frequency with which the system should apply the proration rule:

- *Daily*
- *Weekly*
- *Monthly*

### Date Indicator

Use this field only when the proration frequency is set to *Monthly*. Select one of these values to indicate when the system should use the proration rule:

- *Day of Month*
- *End of Month*

### Day of the Month

If you select *Day of Month* in the Date Indicator field, you must also enter the day on which the proration rule is used. This number cannot be greater than 28.

## Prorate Rule Parameters

### Include Temporary Time

Select to include the proration rule in calculations involving temporary time. If this check box is deselected, the Regular/Temporary field on the employee's Job Data - Job Information page for which the proration rule is being applied must have an employment status of *Regular* to be considered eligible.

### Include Part Time

Select to include the proration rule in calculations involving part-time pay. If this check box is deselected, the Full/Part field on the employee's Job Data - Job Information page for which the proration rule is being applied must have an employment status of *Full-Time* to be considered eligible.

### Last Increase Date

Select to indicate that the eligibility date for compensation adjustments starts with the date the employee's pay was last increased.

---

**Note:** The system uses the Last Increase Date field in conjunction with the fields in the Restart Eligibility Date Action Reasons group box. The last increase date will only restart based on the action reasons that are specified.

---

### Last Hire Date

Select to indicate that the eligibility date for compensation adjustments starts with the date the employee was last hired.

### Weekly Minimum Standard Hours

This field is only used when the Include Part Time check box is selected. The system only makes proration calculations on time

if the employee is part time and the weekly standard hours are greater than or equal to this number.

### Eligible Payroll Statuses

Select the payroll status for which the system should apply the proration rule. You can select multiple statuses by clicking the Add a new row button.

### Restart Eligibility Date Action Reasons

#### Action and Reason

Select an action and reason to indicate why eligibility should be restarted. The system displays descriptions next to the action and reason that you select. To add multiple actions and reasons, insert additional rows.

---

## Defining Compensation Cycles

This section discusses how to:

- Enter general cycle definition parameters.
- Enter salary calculation information.
- Enter award information.
- Configure the Manager Self-Service page.

## Pages Used to Define Compensation Cycles

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Define Compensation Cycles - General	WCS_ECM_CYC_DEF	Set Up HCM, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, General	Enter general parameters for the compensation cycle.
Define Compensation Cycles - Salary	WCS_ECM_CYC_SAL	Set Up HCM, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Salary	Enter parameters that control the calculations of one or more compensation rate related increases.
Define Compensation Cycles - Awards	WCS_ECM_CYC_AWD	Set Up HCM, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Awards	Enter parameters for including variable compensation bonus plans in the cycle.
Define Compensation Cycles - Self-service	WCS_ECM_CYC_MSS	Set Up HCM, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Self-service	Configure behaviors for the self-service components.

## Prerequisites for Defining Compensation Cycles

Here are the prerequisites that you need to complete before you define your compensation cycles:

- Define group IDs.

To generate documents for a group of employees, HR administrators or managers must specify the ID of the group that contains the employees they want to process.

- Define trees.
- Define ePerformance document types (optional if the cycle is applying ePerformance integration).
- Define a configurable matrix (optional).
- Define variable compensation plans (optional).
- Define rounding rules.
- Define proration rules.

### Related Links

[Compensation Cycles in eCompensation Manager Desktop](#)

"Understanding Group Build (*PeopleSoft HCM 9.2: Application Fundamentals*)"

[Building Trees](#)

"Defining Document Types (*PeopleSoft HCM 9.2: ePerformance*)"

"Understanding Configurable Matrices (*PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting*)"

"Understanding Variable Compensation Plan Types (*PeopleSoft HCM 9.2: Human Resources Manage Variable Compensation*)"

[Setting Up Prorate and Rounding Rules](#)

## Define Compensation Cycles - General Page

Use the Define Compensation Cycles - General page (WCS\_ECM\_CYC\_DEF) to enter general parameters for the compensation cycle.



## Navigation

Set Up HCM, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, General

### Image: Define Compensation Cycles - General page

This example illustrates the fields and controls on the Define Compensation Cycles - General page.

Parameters entered on this page are not specific to any one salary plan or bonus plan. They include funding period begin and end dates, currency conversion settings, employee group parameter, performance integration settings, help URLs and other settings that control manager self-service.

Performance integration settings could impact funding calculation for a salary plan using a configurable matrix.

### Cycle ID

Before you access this page enter a short phrase or abbreviation that uniquely identifies the cycle. Typically, you create this identifier when you are adding a new cycle.

---

**Note:** Do not use spaces when you create a cycle ID as this can cause problems when embedding a link into an email where this field is used as a key.

---

### Cycle Description

Enter a term that best describes the cycle.

## Parameters

<b>Funding Period Begin and Funding Period End</b>	Enter the beginning and ending dates of the funding cycle. The Funding Period Begin date must be greater than the Funding Period End date. Typically funding periods are a year in length.
<b>Period Description</b>	Enter a description for the funding period.
<b>Cycle Status, Last Update Date/Time, and Last Update User ID</b>	These fields display the status of the cycle, the date that the cycle was last updated, and the user ID of the person who last updated the cycle.
<b>Group ID</b>	Select the group that defines the population of employees for which the cycle applies.

---

**Note:** The Compensation Administrator must have access to the group through standard group security. In addition, this component must be included in the Group Component list. The Cycle Definition component should also be added to the default set within group definition.

---

## Hierarchy

<b>Tree Set ID</b>	If the tree name is based on a setID (for example department, location, and so on) select one using the Lookup button. If the tree is not based on a setID, this field is not required.
<b>Tree Name</b>	Select the tree that is used as the basis for structuring the organizational hierarchy within the Manager Self-Service component.
<b>Tree Effective Date</b>	Select the effective date of the tree you selected in the Tree Name field.
<b>Default Manager Role</b>	<p>Select one of the values from the drop-down list menu to indicate the hierarchy that you want the cycle to be based on. Values include:</p> <ul style="list-style-type: none"> <li>• <i>Position Incumbent (Rpts To)</i>(reports to)</li> <li>• <i>Department Position Nbr</i></li> <li>• <i>Manager ID</i></li> <li>• <i>Supervisor ID</i></li> <li>• <i>None</i></li> </ul>

---

	<p><b>Note:</b> If you do use this field, the Calculation and Build process populates the Cycle Access table with the appropriate employee ID and sets the role to Manager. The Cycle Build process only defaults to the Cycle Access table with Submitter role access, which is based on the Default Manager Role setting. The compensation administrator can enter additional cycle role access.</p>
<b>Tree Node Label</b>	Enter a description for the tree node associated with the compensation cycle.
<b>Cycle Currency</b>	
<b>Planning Currency</b>	Select the currency code that you want to use from the currency code table.
<b>Conversion As Of Date</b>	Enter the date that you want the system to convert the currency that you are using for this cycle. The underlying market rate tables must be fixed from the point that compensation is calculated within the cycle.
<b>Rate Type</b>	Select the rate type that you want to use for the cycle.
<b>Market Rate Index</b>	Select a value from the Rate Index table to indicate the index you want the system to use to calculate the conversion of the currency.
<b>Performance Integration</b>	
<b>Source Data</b>	<p>If you are integrating information from eCompensation Manager Desktop with a Performance application, select the appropriate application: Values include:</p> <ul style="list-style-type: none"> <li>• <i>PeopleSoft ePerformance</i></li> <li>• <i>Other</i></li> <li>• <i>None</i></li> </ul>
	<hr/> <p><b>Note:</b> If you select <i>Other</i>, it is the your responsibility to populate the PS_WCS_EP_APPR table.</p> <hr/>
<b>Period Begin Date and Period End Date</b>	Enter the date range for performance documents.
<b>Document Type</b>	Select the appropriate performance document type.
<b>Use Rating</b>	Select the use rating that you are using in your ePerformance application.

**Note:** The system makes the Period Begin Date, Period End Date, Document Type, and Use Rating fields unavailable for entry unless you select *ePerformance* as the value in the Source Data field.

## Define Compensation Cycles - Salary Page

Use the Define Compensation Cycles - Salary page (WCS\_ECM\_CYC\_SAL) to enter parameters that control the calculations of one or more compensation rate related increases.

### Navigation

Set Up HCM, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Salary

### Image: Define Compensation Cycles - Salary page

This example illustrates the fields and controls on the Define Compensation Cycles - Salary page.

The screenshot displays the 'Define Compensation Cycles - Salary' page. At the top, there are tabs for 'General', 'Salary', 'Awards', and 'Self-service'. The 'Salary' tab is selected. Below the tabs, the 'Cycle ID' is 'FOCAL2011' and the 'Cycle Description' is 'Focal 2011 Salary & Bonus'. The 'Funding Period' section shows 'Begin' as '01/01/2011' and 'End' as '12/31/2011'. The 'Description' is 'Focal for 2011'. The 'Salary Parameters' section includes 'Increase Effective Date' (02/15/2012) and '\*New Hire Eligibility Date' (12/31/2010). Below these are two tables: 'Job Change Rules' and 'Eligible Rate Codes'. The 'Job Change Rules' table has columns for '\*Job Change Type' and 'Exclude', with rows for 'Active to Inactive Status' and 'Salary'. The 'Eligible Rate Codes' table has columns for '\*Rate Code' and 'Description', with rows for 'NAANNL' (Default NA Annual) and 'NAHRLY' (Default NA Hourly). The 'Salary Plans' section includes '\*Plan' (Merit Increase), 'Rounding Rule' (KUV001), '\*Plan Sequence' (1), 'Matrix ID' (FY2011\_PERF), and checkboxes for 'Use Configurable Matrix', 'Discretionary', and 'Default Proposal to Funded'. The 'Proration Parameters' section has a checkbox for 'Use Prorate Exception Table', 'Proration Rule', 'Full Period Start Date', 'Eligible End Date', and 'Earliest Eligible Start Date'. The 'Action Reasons' section at the bottom is a table with columns for '\*Sequence', '\*Action', '\*Reason', '\*Display As', and 'Default'. It contains one row: Sequence 1, Action PAY, Reason MER, Display As Merit Pay, and Default checked.

Parameters entered on this page include increases based on merit, pay adjustment, promotions, and so on. These parameters may include relevant salary rate codes, calculation rule matrixes, prorated and rounding rules, and applicable action and reason codes.

## Salary Parameters

### Increase Effective Date

Enter the date when you want any proposed compensation changes to be effective. This date must be on or after the Funding Period Begin Date.

### New Hire Eligibility Date

Enter the date when new hires are eligible for compensation changes. This date must be before the Funding Period Begin Date

The system is designed to allow customers to filter out employees that have not worked for a minimum period of time prior to the funding period to be considered eligible. For example, you might have a business policy that employees must be employed for at least 6 months to be considered eligible for any form of an increase.

## Job Change Rules

### Job Change Type

Select the type or types of employee job change you want the system to track after the snapshot process has run and the cycle is in the Open status.

Available values are:

*Active to Inactive Status* - HR status of employee is changed to inactive, for example, employee is terminated.

*Currency Code* - employee's salary currency code is changed.

*Salary*- employee's salary is changed.

### Exclude

Select this option for a job change type if you want the Job Change process to zero out funded and proposed amounts for employees who had that job change recorded during the open cycle.

If this option is not selected, the Job Change process doesn't do anything to the funded and proposed amounts for employees who had that job change during the open cycle. The manager, after receiving the alert, can then decide what to do with the amounts, for example, reallocate them to other direct reports.

## Eligible Rate Codes

### Rate Code and Description

Select the rate code that you want to use for changes to compensation. The system automatically fills in the description after you select the rate code.

---

**Note:** The system allows you to add rows to enable you to add multiple rate codes. However, an employee can only have one compensation rate code adjusted during the Compensation Cycle process.

---

## Salary Plans

### Plan

Enter a description for the salary plan that you want managers to see on the Manager Self-Service pages.

### Plan Sequence

Enter a number to indicate the order in which you want the system to display salary plans within the self service pages for the compensation cycle.

### Rounding Rule

Select the rounding method that you want to use for the salary plan.

### Use Configurable Matrix

Select this check box if you plan to use a configurable matrix to calculate funding information. If you select this check box, the system makes the Funding Percent, Minimum Percent, and Maximum Percent fields unavailable for entry.

### Matrix ID

Select the matrix that you want to use to drive the funding calculation.

See "Defining Salary Increase Guidelines Using a Configurable Matrix (*PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting*)".

### Funding Percent

Enter the total funding percent by which you would allow a manager to adjust salaries in their department.

### Minimum Percent

Enter the minimum percent by which you would allow a manager to adjust an employee's salary.

### Maximum Percent

Enter the maximum percent by which you would allow a manager to adjust an employee's salary.

### Discretionary

Select this check box if you want to enable managers to override the calculated funding amount.

### Default Proposal to Funded

Select this check box to set the default proposal to the calculated funded amount.

## Proration Parameters

### Use Prorate Exception Table

Select this check box if you want to use information from the Prorate Exception (WCS\_PRO\_EXC\_TBL) table in the build process. If there is no entry in the Prorate Exception Table, the build process sets the prorate factor to 1.

---

**Note:** If you select this check box, the system makes the Proration Rule, Earliest Eligible Start Date, Full Period Start Date, and Eligible End Date fields unavailable for entry.

---

### Proration Rule

Select the proration rule that you want to use for salary increases or adjustments. The values that you are able to select come from the Prorate ID table (WCS\_PRORATE\_ID).

### Earliest Eligible Start Date, Full Period Start Date, and Eligible End Date

Enter the begin and end dates to which the proration period applies. These fields are required if you specify a proration rule. Typically, this period is for the year prior to the funding period.

See [Understanding Proration Calculation Rules](#).

## Action Reasons

### Sequence

Enter a number to control the order that you want the system to load the action reason for the plan when updates are run.

### Action

Select an action from the Action table.

### Reason

Select a reason from the Action Reason table.

### Display As

Enter a description for the action that you want managers to see when they access the Manager Self-Service page.

### Default

Select the action that you want to use as a default on the Manager Self-Service page. You must select only one action for the plan.

## Define Compensation Cycles - Awards Page

Use the Define Compensation Cycles - Awards page (WCS\_ECM\_CYC\_AWD) to enter parameters for including variable compensation bonus plans in the cycle.

### Navigation

Set Up HCM, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Awards

### Image: Define Compensation Cycles - Awards page

This example illustrates the fields and controls on the Define Compensation Cycles - Awards page.

Variable Compensation Plan	Payout Period	Award Type	Display As	Funding Calculation	Discretionary	Default Proposed	Rounding Rule
KUBON2011	2011	Cash	Bonus	Use VC Cal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	KUV001

Parameters entered on this page include variable compensation plan and payout period, plan type, and budget calculation type.

## Award Plans

### Variable Compensation Plan

Select a plan from the Variable Compensation Plan table.

### Payout Period

Select a payout period from the Variable Compensation Payout Period table.

---

**Note:** The payout period has to be within the start and end date of the cycle period to be added to the definition.

---

### Award Type

Select an award type. Values include:

- *Cash*
- *Non-Cash*
- *Stock*

The system derives these default values from the variable compensation plan types:

- *Cash: Discretionary (D), Goal Sharing (G) or Profit Sharing (P).*
- *Stock: ISO (I), NSAR (K), NQ (Q), RSA (R) or ISAR (S).*
- *Non-Cash: Non-Monetary (N) or Other (O).*

### Display As

Enter a description for the award plan that you want managers to see on the Manager Self Service page.

### Funding Calculation

Select the type of funding calculation that you want the system to use for the variable compensation plan. Values are *VC Calc* and *Manual*.

---

**Note:** If you select *VC Calc* the funding is defaulted to the award amounts that are calculated by variable compensation at the employee level. If you select *Manual* the compensation administrator will have to manually allocate a funding amount for each group node for the variable compensation plan.

---

### Discretionary

Select this check box if you want to enable managers to override the calculated funding amount. If you selected *Manual* as the Funding Calculation method for the VC plan, you must select this check box.

### Default Proposed

Select this check box if you want the system to default the plan to the proposed amount to the calculated variable compensation amount or the manually funded amount for each employee. If you do not select this check box, the system displays *0.00* as the proposed amount.



**Rounding Rule**

Select the rounding rule that you want the system to use to calculate award amounts. If you do not specify a rounding rule, the system sets all rounding of the funded and proposed amounts to 2 decimals.

**Define Compensation Cycles - Self-Service Page**

Use the Define Compensation Cycles - Self-service page (WCS\_ECM\_CYC\_MSS) to configure behaviors for the self-service components.

## Navigation

Set Up HCM, Product Related, Compensation, Compensation Processes, Define Compensation Cycles, Self-service

### Image: Define Compensation Cycles - Self-service page (1 of 2)

This example illustrates the fields and controls on the Define Compensation Cycles - Self-service page (1 of 2).

General		Salary	Awards	Self-service
Cycle ID		FOCAL2011		
Cycle Description		Focal 2011 Salary & Bonus		
<b>Funding Period</b>				
Begin	01/01/2011		Description	Focal for 2011
End	12/31/2011			
<b>Configuration</b> ?				
<input type="checkbox"/> Enable Currency Conversion		<input checked="" type="checkbox"/> Enable Indirect Report Updates		<input type="checkbox"/> Display Award History
<input type="checkbox"/> Enable Notepad		<input type="checkbox"/> Enable Role Delegation		
<b>Approvals</b> ?				
<input checked="" type="checkbox"/> Enable Approvals Workflow				
Process ID	ApproveCompensationProposals		Approve Compensation Proposals	
Definition ID	ByTreeNode1Lvl		Compensation One Step Approval	

**Image: Define Compensation Cycles - Self-service page (2 of 2)**

This example illustrates the fields and controls on the Define Compensation Cycles - Self-service page (2 of 2).

The screenshot shows the 'Grid Display Settings' page for the 'Salary Grid'. At the top, there is a dropdown menu for '\*Display Type' set to 'Salary Grid'. Below this is a section titled 'Field Layout' containing a table with columns: Field, Select, Discretionary, and Description. The table lists various fields with checkboxes in the 'Select' column and input boxes with magnifying glass icons in the 'Discretionary' column.

Field	Select	Discretionary	Description
Name	<input checked="" type="checkbox"/>	<input type="text"/>	
View Alert	<input checked="" type="checkbox"/>	<input type="text"/>	
Exclude	<input checked="" type="checkbox"/>	<input type="text"/>	
Notes	<input type="checkbox"/>		
Employee ID	<input type="checkbox"/>	<input type="text"/>	
Employment Record	<input type="checkbox"/>	<input type="text"/>	
Business Unit	<input type="checkbox"/>	<input type="text"/>	
Job Code	<input type="checkbox"/>	<input type="text"/>	
Position Number	<input type="checkbox"/>	<input type="text"/>	
Salary Admin Plan	<input type="checkbox"/>	<input type="text"/>	
Salary Grade	<input type="checkbox"/>	<input type="text"/>	
Salary Step	<input type="checkbox"/>	<input type="text"/>	
Full/Part	<input type="checkbox"/>	<input type="text"/>	
Performance Rating	<input type="checkbox"/>	<input type="text"/>	
Currency	<input type="checkbox"/>	<input type="text"/>	

Options on this page include the ability to view or hide some of the columns that will be displayed on the Manager Self-Service direct reports grid.

**Configuration****Enable Currency Conversion**

Select to enable currency conversion on the Manager Self-Service Direct Reports Detail page.

**Enable Indirect Report Updates**

Select to enable updates to information for indirect reports on the Manager Self-Service Direct Reports Detail page.

When this check box is selected, the system provides updates to employee information that is one level down from the node to which the manager has Submitter role access.

**Display Award History**

Select to display award history on the Manager Self-Service Direct Reports Detail page.

**Enable Notepad**

Select to enable the notepad on the Manager Self-Service Direct Reports Detail page. The notepad is used primarily for manager comments.

**Enable Role Delegation**

Select to enable a manager to delegate their compensation role responsibilities to another manager or employee.

**Approvals****Enable Approvals Workflow**

Select to enable the system to generate approval workflows for managers and employees participating in the compensation cycle.

---

**Note:** When Enable Approvals Workflow is selected, the Confirmer role is not available in the Access Type drop down list box on the Administer Cycle Roles page.

---

**Process ID and Definition ID**

Select the process ID and definition ID that you want to use to generate approval workflow. These IDs are entered on the Setup Process Definitions page (select Set Up HCM, Common Definitions, Approvals, Approvals Setup Center, Setup Process Definitions).

See "Setting Up Approval Process Definitions (*PeopleSoft HCM 9.2: Application Fundamentals*)".

**Grid Display Settings****Display Type**

Select the type of grid that you want the system to display on the Manager Self-Service page. The system displays the fields associated with the grid you selected. Values include:

- *Awards Grid*
- *Salary Grid*
- *Worker Detail*

**Field Layout**

This grid is pre-populated with a fixed set of fields. Select the check boxes to indicate that fields you want to appear within the Individual Proposals grid on the Manager Self-Service - Direct Reports Detail page for a particular section (Salary, Awards, or Worker). Some of the check boxes within the grid may be read-only indicating that there are no field values for the particular field or they may be disabled based on another setting for the compensation cycle. The system also does not allow users to add or delete rows.

**Field**

Displays the name of the field associated with the grid you selected.

**Select**

Select the check boxes associated with the fields that you want to appear within the information grid on the Manager Self-Service - Direct Reports Detail page.

**Discretionary and Description**

Select the text that you want to appear for the field on the Manager Self-Service pages. The system displays the description to the right of the Discretionary field. If you

populate the Discretionary field, the system overrides the Manager Self-Service component with the field label from the corresponding value found in the text catalog.

---

**Note:** You will need to provide the discretionary label values by setting them up in the HR Text Catalog in order to see them listed as part of the prompt. We provide a structure within the HR Text Catalog where you can create these values.

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See "Configuring the Text Catalog (*PeopleSoft HCM 9.2: Application Fundamentals*)".



## Chapter 4

# Configuring Chart Alerts

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## Defining, Configuring, and Maintaining Compensation Alerts

This section discusses how to:

- Define compensation alerts.
- Maintain the alerts text catalog.
- Run the alerts maintenance process.

## Pages Used to Define, Configure, and Maintain Compensation Alerts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Compensation Alert Definition	WCS_ALERT_SETUP	Set Up HCM, Product Related, Compensation, Utilities, Compensation Alert Definition, Compensation Alert Definition	Define and configure compensation alerts for use within the eCompensation Manager Self Service functionality.
Maintain Text Catalog page	HR_SSTEXT_TEXT	Set Up HCM, Product Related, Compensation, Utilities, Compensation Alert Text, Maintain Text Catalog	Create or update the message text used for compensation alerts within the eCompensation Manager Self Service functionality.
Alerts Maintenance	WCS_ALERTS_MAINT	Set Up HCM, Product Related, Compensation, Utilities, Compensation Alert Maintenance, Alerts Maintenance	Report on or purge existing employee compensation alerts.

## Compensation Alert Definition Page

Use the Compensation Alert Definition page (WCS\_ALERT\_SETUP) to define and configure compensation alerts for use within the eCompensation Manager Self Service functionality.

## Navigation

Set Up HCM, Product Related, Compensation, Utilities, Compensation Alert Definition, Compensation Alert Definition

### Image: Compensation Alert Definition page

This example illustrates the fields and controls on the Compensation Alert Definition page.

Compensation Alert Definition

Alert Definitions

Personalize | Find |

Parameters | Text Catalog Keys

*Event Code	*Status	Allow Delete	Allow Duplicates	Preferred Display		
BLT	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
CAN	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
CMP	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Notification Period		
CNF	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Review Period		
FIN	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
JCO	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Notification Period		
MGA	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Update Period		
OPN	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Notification Period		
PSB	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
SUB	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Update Period		

The PeopleSoft eCompensation Manager Desktop application delivers 18 alert definitions. The Compensation Alert Definition component, however, is strictly intended for the maintenance of the valid alert message definitions that are available for processing. The records in the tables are delivered as default data and should only be changed or manipulated in cases where your implementation demands it.

## Parameters Tab

### Event Code

Displays the code that determines which event needs to be raised.

### Status

Select *Active* to activate a specific event for processing.

### Allow Delete and Allow Duplicates

Select the Allow Delete check box to allow users to delete rows. If the Allow Duplicate check box has also been selected, then duplicate alert messages are supported. If the Allow Duplicates check box is deselected, the system replaces any existing message.

### Preferred Display

Select either *Default*, *Notify*, *Review*, or *Update* to indicate the preferred time period the alert should be available for display. Please note that this *preferred* period may not be defined depending on how the cycle definition has been set up.

These display periods relate directly back to the same periods that have been set within the Administer Compensation Cycle component, which was created by the administrator. The actual range of date are specific to each cycle.



## Text Catalog Keys Tab

Text catalog keys are used to populate the message text for the alert. The Object owner identifier, Sub ID and Text ID fields all contain existing prompt values currently in use when setting up the HR Test Catalog.

## Maintain Text Catalog Page

Use the Maintain Text Catalog page (HR\_SSTEXT\_TEXT) to create or update the message text used for compensation alerts within the eCompensation Manager Self Service functionality.

### Navigation

Set Up HCM, Product Related, Compensation, Utilities, Compensation Alert Text, Maintain Text Catalog

### Image: Maintain Text Catalog page

This example illustrates the fields and controls on the Maintain Text Catalog page.

**Maintain Text Catalog**  
Workforce Comp Solutions

Sub ID: ALRT  
Usage: Page Instructions

Text ID: MESSAGE  
Description: Alert Message Text for eCompensation Manager Self Service

**Text Entries** Find | View All First 1 of 1 Last  
Effective Date: 01/01/1900

**Context Keys and Text** Find | View All First 1 of 10 Last  
Event Code: BLT  
Budget ID:  
Access Type:

A compensation cycle has been initiated and will be available soon for your review.

[View/Edit as HTML](#)

[View all effective dates and context keys for this Text ID](#)

The PeopleSoft eCompensation Manager Desktop application delivers nine context keys that you can configure for your Manager Self Service pages.

### Usage

Select one of these values based on how the text will be used:

- *Email Body*
- *Email Subject*
- *Error/Warning*

- *Field Label*
- *Grid/Scroll Heading*
- *Groupbox Title*
- *Hyperlink/Button*
- *Page Instructions*
- *Page Title*

**Event Code**

Select one of these event codes:

- *APR* - Group Status set to Approved.
- *BIP* - Cycle Status set Building.
- *BLT* - Cycle status set to Built.
- *CAN* - Cycle status set to Cancelled.
- *CLC* - Group status set to Calculated.
- *CMP* - Group status set to Completed.
- *CNA* - Confirmer is added to a group.
- *CNF* - Group status set to Confirmed.
- *DEF* - Cycle Status set to Defined.
- *FIN* - Cycle Status set to Finalized.
- *INP* - Group Status to In Progress.
- *MGA* - Manager added to a group.
- *OPN* - Cycle status set to Open.
- *PSB* - Group status Pushed Back.
- *RMV* - Individual is removed a group.
- *RTL* - Group status set to Ready.
- *RVA* - Reviewer added to a group.
- *SUB* - Group status set to Submitted.

**Budget ID**

Select a cycle ID with which you want to associate the text.

**Access Type**

Select one of these values to indicate the role that should have access to the text message:

- *Confirmer*
- *Reviewer*

- *Submitter*

## Compensation Alert Maintenance Page

Use the Compensation Alerts Maintenance page (WCS\_ALERTS\_MAINT) to report on or purge existing employee compensation alerts.

### Navigation

Set Up HCM, Product Related, Compensation, Utilities, Compensation Alert Maintenance, Compensation Alerts Maintenance

### Image: Compensation Alerts Maintenance page

This example illustrates the fields and controls on the Compensation Alerts Maintenance page.

#### Action

Select one of these values to indicate the action you want the system to take regarding the disposition of the alerts:

- *Log Alerts*
- *Log Expired Alerts*
- *Purge Alerts*
- *Purge Expired Alerts*

#### Cycle ID

Select a cycle for which you want the system to take action.

#### Start Date

Select the date upon which you want the system to start an action.

#### Tree Node Number

Enter the tree node number upon which you want the system to take action.

#### Access Type

Select one of these values to indicate which access type upon which you want the system to take action:

- *Comp Admin*
- *Confirmer*
- *Reviewer*
- *Submitter*

**Employee ID**

Enter the employee ID upon which you want the system to take action.

# Administering Compensation Cycles

---

## Understanding Cycle Administration

The administration of a particular cycle instance is performed by the compensation administrator within a single component. While simple tasks are performed within the Administer Cycle component, the more complex tasks are performed by clicking buttons that link to other components.

The main purpose of the Administer Cycle component is to provide a single point from which an administrator can manage all phases of a compensation cycle and to provide summary analytics to monitor the progress of managers.

At a high level, the administration of a compensation cycle involves these tasks:

1. Building of the cycle by populating processing tables with employees' demographical data, compensation proposals and funding information.

This is done by running the Cycle Build AE process.

2. Opening the cycle (after making sure that data is correct) to managers to review and make necessary adjustments to compensation proposals for their reports on the Allocate Compensation page.

While a cycle is opened, the administrator can run the Process Job Change AE process to capture several types of job changes taken place during the open cycle, and notify managers of these changes as they begin to allocate compensation amounts to their employees.

3. Loading awards and salary updates to employees' job data, after managers have submitted their proposals, which are approved by the administrator.

This is done by running the Cycle Load AE process.

4. Closing the cycle.

As an administrator, you track the phases of a compensation cycle using the cycle status code. As the compensation cycle proceeds, you perform the tasks that are represented as action buttons in a process flow. In many cases these tasks are, in turn, dependent upon each other and may modify the cycle status code.

See Administer Cycle Page.

---

## Understanding the Cycle Build Process

The Compensation Cycle Build (WCS\_ECMBUILD) application engine (AE) process populates a series of processing tables that are used to store a snapshot of the employee demographic data, salary proposals, variable compensation proposals, funding information for each of the group nodes defined in the tree

hierarchy, and the default role access. It also performs a series of validations and edits to identify any errors in building your compensation cycle.

Prior to building a compensation cycle, make sure that:

- The funding information and options are entered in the compensation cycle definition. Specifically, enter the total funding, minimum and maximum percentages allowed when a manager adjusts salaries in his or her department if Configurable Matrix is not used. Select the Discretionary check box to if you want to allow managers to override the calculated funding amount; select the Default Proposal to Funded check box to set the default proposal to the calculated funded amount.
- ePerformance reviews are in a *Complete* status.
- Variable compensation has been calculated and is in an *Initial* status.
- The Proration Exception table is populated.
- Employee changes to job history are accurate for any type of proration calculation.

When the Compensation Cycle Build process successfully builds your compensation cycle, the system sets the status of the compensation cycle to *Built*. As you review the results of the built compensation cycle, you may find that you need to make adjustments to its definition. When that happens, simply cancel the built compensation cycle, adjust the compensation cycle definition, and run the Compensation Cycle Build process again.

Once the calculated funding has been reviewed and finalized, the built compensation cycle is ready to be opened to managers.

---

**Note:** If you have multiple languages turned on, you need to initiate the Update Cycle Languages (WCS\_ECM\_LANG) process after running the Compensation Cycle Build process. Doing this supports language translation for the Tree Node description. To access the Update Cycle Languages page, select Compensation, Compensation Cycles, Update Cycle Languages.

---

See "Calculation Processes (*PeopleSoft HCM 9.2: Human Resources Manage Variable Compensation*)".

---

## Understanding Job Change Processing During Open Cycles

After the administrator has opened a compensation cycle, managers can begin allocating salary and variable compensation amounts to employees and submitting proposals for approval. During this time, changes can happen to employees' HR data, and these changes (for example, employee termination) may have an impact on the adjustments that an individual and as well as other employees should receive. To provide managers more information and hence better insight on how to handle employee job changes during the open cycle, the system delivers the ability to:

- Capture job changes that occurred to employees during the open cycle and optionally zero out proposed amounts that are assigned to employees as configured in the compensation cycle definition.
- Display alert messages for employees who had job changes.

To set up this functionality, you specify the type of job changes that the system needs to track on the Define Compensation Cycles - Salary page. Supported job change types include:

- Change of employee's HR status from active to inactive (for example, termination)
- Salary change
- Salary currency change

For each type that is selected, indicate if the system should zero out the budget and proposed amounts for individuals that are found with that type of job change, or leave the amounts unchanged and let the managers take care of them manually.

The system generates alert messages when employees with one or more of the preselected job changes were identified during the open cycle. These alerts are available when managers and administrators access the Allocate Compensation component, and they are displayed next to the associated employees in the View Alert column:

### Image: Display of job change alert on the Allocate Compensation page

This example illustrates the fields and controls on the Display of job change alert on the Allocate Compensation page.

Merit Pay		Bonus Plan											
Direct Reports													
Name	View Alert	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Proposed Annual Rate	Personalize   Find   View All	Compa-Ratio	Salary Grade	Performance Rating	
Donahue, Edmund		<input type="checkbox"/>	62,400.00	1,872.00	3.00	624.00	1.00	63,024.00		0.85 006	N		
Lee, Mei		<input type="checkbox"/>	40,040.00	2,002.00	5.00	2,002.00	5.00	42,042.00		0.76 005	M		
Quilligan, Shawn		<input type="checkbox"/>	48,006.40	1,440.00	3.00	480.00	1.00	48,486.40		0.92 005	N		
Reese, Daryl		<input type="checkbox"/>	40,560.00	4,056.00	10.00	4,056.00	10.00	44,616.00		0.97 004	C		
Stevenson, Christelle		<input type="checkbox"/>	26,000.00	1,300.00	5.00	1,300.00	5.00	27,300.00		0.85 003	M		
<div> </div>													
Indirect Reports													
Empl ID and Record	Name	Group Status	Balance	Total Eligible Salaries	Total Funded Amount	Funded Percent	Total Proposed Amount	Proposed Percent	Personalize   Find   View All	Status Date	First	1-2 of 2	
KU0102_000	Edmund Donahue	Pushed Back	-1,500.00	87,048.00	3,152.00	3.62	4,652.00	5.34	06/05/12 5:03PM				
KU0020_000	Christelle Stevenson	Confirmed	0.00	53,040.00	3,192.00	6.02	3,192.00	6.02	06/05/12 5:02PM				
Return to Message & Alerts													

To ensure that these alerts are always visible as they become available, the View Alert field (under the Grid Display Settings section of the Define Compensation Cycles - Self-service page), where the alert

icons are shown, is selected by default. When a manager clicks an alert icon, a modal window appears, and it lists details pertaining to the corresponding job change:

**Image: Display of job change alert message after clicking an alert icon**

This example illustrates the fields and controls on the Display of job change alert message after clicking an alert icon.

The screenshot shows a modal window titled "Job Changes" with a close button in the top right corner. Inside the window, there is a tab labeled "Salary Change". Below the tab, the following information is displayed:

Employee Name	Stevenson, Christelle
Effective Date	02/04/2012
Currency Code	USD
HR Action	Pay Rate Change
Reason	MER
Old Salary	26,000.000000
New Salary	15,500,000
Change Percent	24.000
Explanation	This employee had a salary change during the open cycle.

At the bottom left of the window, there is a "Return" button.

With this information in hand, the manager can allocate compensation amounts to his or her reports appropriately.

---

**Note:** The View Alert field is only available when the selected display type is *Salary Grid*.

---

## Processing Job Changes

Compensation delivers the Process Job Change (WCS\_CYC\_RULE) AE process to capture employee job changes when a cycle is opened.

As an administrator, you run this AE process from a standard run control component once a cycle is opened. When the process is launched, it compares, for each employee included in the cycle, the snapshot of the job record that was taken right before the cycle was opened against the job record as of the salary increase effective date specified for the compensation cycle. If it finds any of the following job changes during this timeframe:

- (*Active to Inactive Status* change) Payroll status is not equal to A, L, P, or S
- (*Currency Code* change) Change in compensation currency code
- (*Salary* change) Change in compensation rate

And the corresponding job change type is selected in the associated compensation cycle definition to be tracked, the update is recorded in a log file.

Next, the process checks if the Excluded option is selected for the job change type. If a change is identified for a selected job change type with the Excluded option enabled, the system zeros out the proposed amount for the employee and marks that employee as excluded from the cycle, if the employee belongs to a group node that is in the *Calculated*, *In Progress*, or *Pushed Back* status. After that, the funded and proposed amounts are recalculated at the node level. If the Exclude option is not selected, the funds for employees with the job change remain intact.



This table lists the possible actions that the Process Job Change AE process performs when a qualifying job change occurs, based on the employee's group node status and whether or not the Excluded option of the job change is selected:

<b>Group Node Status</b>	<b>Action (Excluded option Selected)</b>	<b>Action (Excluded option Not Selected)</b>
Calculated	Zeros out employee's proposed amount, excludes employee from cycle, and logs job change	No change to fund and logs job change
In Progress	Zeros out employee's proposed amount, excludes employee from cycle, and logs job change	No change to fund and logs job change
Pushed Back	Zeros out employee's proposed amount, excludes employee from cycle, and logs job change	No change to fund and logs job change
Submitted	No change to fund and logs job change	No change to fund and logs job change
Approved	No change to fund and logs job change	No change to fund and logs job change
Ready to Load	No change to fund and logs job change	No change to fund and logs job change

Recorded job changes are available for review as alerts in the Allocate Compensation component, which is accessible from the Manager Self Service for managers, as well as the Manage Cycle Transactions component for administrators.

## Considerations for Job Change Processing

### General

When an employee has been excluded from a cycle by the Job Change process, he or she remains excluded throughout the cycle. For example, if the employee has a salary change during an open cycle and salary change is a job change that has the Excluded option enabled, the process zeros out his or her compensation amounts and marks him or her as excluded. If the employee has a currency code change later on in the open cycle and this job change *does not* have the Excluded option enabled, the process captures the currency code change but it does not update the excluded status of the employee based on the setup of the corresponding job change.

Another note for the Excluded option is that the process only zeros out compensation amounts of employees only when they belong to a group node that is in *Calculated*, *In Progress*, or *Pushed Back* status, in which the manager can edit the amounts as needed. Once the proposals are in the *Submitted*, *Approved*, or *Ready to Load* status and are no longer available for edits, the process still captures the job changes, but will not zero out employees' budget and proposed amounts regardless of setup. Approvers of these proposals can see the Exclude flag when viewing proposal details, and push the transactions back to managers for them to manually zero out the funds and reallocated them to employees based upon company policy.

Also, the Job Change process does not process corrections. For example, an employee is terminated during an open cycle and the HR status is changed to *Inactive*. When the Job Change process runs, it picks up this job change and displays an alert on the Allocate Compensation page. If the same employee is rehired later and the HR status reactivated, this change will not be captured by the Job Change process.

## Salary Change Specific

The Job Change process is responsible for processing job changes that occur only for the rate codes that are specified in the cycle definition. It does not process any job change that happens to an employee during an open cycle but is not for any rate code listed in the cycle definition.

---

## Understanding the Cycle Load Process

The Compensation Cycle Load process loads awards and salary updates from the Compensation Cycle processing tables to employees' job data. For this to happen, managers should have entered and submitted their proposals through the Allocate Compensation page in eCompensation Manager Desktop. After the compensation administrator has confirmed the accuracy of the proposals or they have been approved through the AWE process, the compensation administrator has to mark the group *Ready to Load*.

The Load Salary Updates and Awards process is an AE program that is run via the PeopleSoft Process Scheduler. It is launched via a standard run control component. In general, access to this component should be controlled as the new Job Data Salary change transactions that will be created need to be coordinated with benefits and payroll.

---

**Note:** The Load process sets the group node status in either the *Complete* or *Complete with Error* status. The Load Salary Updates and Awards process will only process a group node that is in the *Ready to Load* status once. However, as group nodes move to the *Ready to Load* status, you can continue to run the Load Salary Updates and Awards process for your Compensation Cycle to process those nodes.

---

<b>Step</b>	<b>Description</b>
Validate Run Control Parameters	The system obtains run control parameters as well as the cycle status for the designated cycle. If the cycle status is not <i>Open</i> , the system perform exits to abort the process.
Populate Configuration Row Sets	The system creates stand alone component level row sets to hold the variable compensation, salary, and salary action cycle configurations. For non-cash variable compensation plans, the system obtains the current valuation per unit value.
Create Direct Report Group Row Set	The system selects all direct report group rollup nodes where the group status is equal to <i>Ready To Load</i> . For each row, the system retrieves information from the Process Salary Increases, Process Awards and Update Group Status sections.

<b>Step</b>	<b>Description</b>
Process Salary Increases	<p>For each employee salary plan row within the selected group, which is ordered by employee ID, record number, plan sequence and reason sequence, the system:</p> <ol style="list-style-type: none"> <li>1. Obtains the current compensation row for the compensation rate code.</li> <li>2. Annualizes the current compensation rate.</li> <li>3. Converts eCompensation increase amounts to the currency code using cycle currency conversion parameters.</li> <li>4. Adds converted eCompensation increase to the current annualized compensation rate, while obtaining the new annualized compensation rate.</li> <li>5. Converts the new annualized compensation rate to the current compensation frequency, while obtaining the new compensation rate.</li> <li>6. Inserts new Job Data rows.</li> <li>7. Makes the effective date equal to the planned effective date from the cycle definition.</li> <li>8. Makes the effective sequence equal to the current effective sequence plus 1 if the current effective date is equal to the planned effective date, otherwise it's zero.</li> <li>9. Makes the action equal to the action from the corresponding Salary Action Cycle row.</li> <li>10. Makes the reason equal to the reason from the corresponding Salary Action Cycle row.</li> <li>11. Updates the appropriate Compensation rows with the new compensation rate.</li> <li>12. Invokes the Calculate Compensation button.</li> <li>13. Saves.</li> </ol> <hr/> <p><b>Note:</b> The system sets the row status to <i>Error</i> if the component interface fails for any reason. If the save is successful, the system sets the row status to <i>Processed</i>.</p> <hr/>

<b>Step</b>	<b>Description</b>
Process VC Awards	<p>For each eCompensation Variable Compensation row within the selected group, which is ordered by employee ID, record number and variable compensation plan ID, the system updates the Variable Compensation Award table with appropriate amounts as follows:</p> <ol style="list-style-type: none"> <li>1. Obtains currency code from the corresponding Variable Compensation Award row.</li> <li>2. Converts the eCompensation adjusted and proposed award amounts from the eCompensation currency code to the variable compensation currency code using the cycle currency conversion parameters if the plan is monetary.</li> <li>3. Makes the variable compensation adjusted award equal to the converted eCompensation adjusted award.</li> <li>4. Makes the variable compensation actual award amount equal to the converted eCompensation proposed award, if the plan is monetary.</li> <li>5. Makes the variable compensation adjusted actual award unit equal to the eCompensation proposed award, if the plan is non-monetary.</li> <li>6. Makes the variable compensation award value equal to the eCompensation proposed award time, which corresponds to the valuation per unit value, if the plan is non-monetary.</li> <li>7. Sets the variable compensation award status to <i>Approved</i> if the eCompensation proposed amount is greater than 0; otherwise the system sets the status to <i>Cancelled</i>.</li> <li>8. Sets the row status to <i>Processed</i>.</li> </ol> <hr/> <p><b>Note:</b> If a row is excluded, the system sets the proposal status to <i>Bypassed</i> and ends further processing on the row. If there is not a corresponding row in the Variable Compensation Award table for the plan, payout period, employee ID, and employee record, the system sets the proposal status to <i>Error</i>, logs the action, and ends further processing on the row.</p> <hr/>
Update Group Status	Sets the group status to <i>Complete</i> .
Terminate	Writes totals to log and closes the process.

## Updating Future Dated Job Row(s) with a Salary Update

The Compensation Cycle Load process performs specific validations prior to inserting a new job data row with the approved salary update. If a future dated job row exists to that salary update being applied, then the process performs the same validations on the future dated row to determine if the salary update can be inserted into job.

If it finds that *any* of these conditions is not true:

- The employee status is equal to A, L, P, or S.
- The employee still has the compensation rate code being adjusted by the cycle.
- The employee has the same currency code that was used during the cycle.

- The employee has the same annual salary that was adjusted during the cycle.

It sets the proposal status to *Load Error* and writes the error in the log for the salary update. The compensation administrator, after reviewing the error information, can take the appropriate action based on company policy to manually apply the salary update to the employee's job data.

---

## Administering Compensation Cycles

This section discusses how to:

- Administer the cycle process flow.
- Define access rules.
- View the cycle summary.
- Run the cycle build and calculation process.
- Run the load salary updates and awards process.
- Run the job change process.
- Manage compensation cycle transactions.
- Review and update transactions for individuals.

## Pages Used to Administer Compensation Cycles

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Administer Cycle	WCS_ECM_CYC_ADM	Compensation, Compensation Cycles, Administer Cycle, Administer Cycle	Build, open, load, close, and cancel compensation cycles.
Access Rules	WCS_ECM_CYC_PDS	Compensation, Compensation Cycles, Administer Cycle, Access Rules	Set the time periods in which managers can review, update, and be notified of changes in the compensation cycle.
Summary	WCS_ECM_CYC_SUM	Compensation, Compensation Cycles, Administer Cycle, Summary	View a summary of the cycle, including funding period, status, currency, funding amounts, funding percentages, headcounts, and calculated total salaries.
Build Cycle	WCS_ECMBUILD_RCTL	Click the Build button on the Administer Cycle page.	Run the Cycle Build Application Engine program.
Load Salary Updates and Awards	WCS_ECMLOAD_RCTL	<ul style="list-style-type: none"> <li>• Compensation, Compensation Cycles, Load Salary Updates and Awards, Load Salary Updates and Awards</li> <li>• Click the Load button on the Administer Cycle page.</li> </ul>	Run the Load Salary Updates and Awards Application Engine program.

Page Name	Definition Name	Navigation	Usage
Process Job Changes	WCS_RULE_RNCTL	Compensation, Compensation Cycles, Process Job Changes, Process Job Changes	Run the Job Change Application Engine program to capture employee job changes when a cycle is opened.
Manage Cycle Transactions	WCS_ECM_MSS_SUM	Compensation, Compensation Cycles, Manage Cycle Transactions, Manage Cycle Transactions	Enter the compensation proposal changes for your direct reports or navigate into any of your indirect groups to review their proposals.
Manage Cycle Transactions - Direct Reports	WCS_ECM_MSS_DET	Click a name link in the Direct Reports section of the main Manage Cycle Transactions page.	Enter compensation proposal changes for individuals.

## Administer Cycle Page

Use the Administer Cycle page (WCS\_ECM\_CYC\_ADM) to build, open, load, close, and cancel compensation cycles.

### Navigation

Compensation, Compensation Cycles, Administer Cycle, Administer Cycle

### Image: Administer Cycle page

This example illustrates the fields and controls on the Administer Cycle page.

Administer Cycle | Access Rules | Summary

Cycle ID FOCAL\_2011

Cycle Description Focal 2011 Salary and Bonus

Funding Period

Begin 01/01/2011

End 12/31/2011

Description Focal 2011 Cycle

Process Flow ?

Cancel Cycle ?

Analytics

▼ Compensation Analytics

Status History

Personalize | Find | View All | [icon]

First 1-10 of 16 Last

Cycle Status	Last Updated	User ID	Name
Opened	06/05/12 5:01PM	SAMPLE	Betty Locherty
Built	06/05/12 5:01PM	SAMPLE	Betty Locherty
Build In Progress	06/05/12 5:01PM	SAMPLE	Betty Locherty
Canceled	06/05/12 4:57PM	SAMPLE	Betty Locherty
Opened	06/05/12 4:56PM	SAMPLE	Betty Locherty
Built	06/05/12 4:55PM	SAMPLE	Betty Locherty
Build In Progress	06/05/12 4:55PM	SAMPLE	Betty Locherty
Canceled	06/05/12 4:54PM	SAMPLE	Betty Locherty
Opened	06/05/12 4:19PM	SAMPLE	Betty Locherty
Built	06/05/12 4:15PM	SAMPLE	Betty Locherty

## Process Flow



**Build**

Click the Build button to access the Build Cycle page.

The system enables this button only if the cycle status is *Defined* or *Cancelled*.



**Open**

Click the Open button to access the Administer Cycles Confirmation page and open funding for the cycle. The system enables this button only if the cycle status is *Built*.

The system displays a confirmation page with an appropriate message. If the user clicks OK, the system sets the current cycle status to *Open*.



**Load**

Click the Load button to access the Load Salary Updates and Awards page.

The system enables this button only if the cycle status is *Open* and one or more group statuses are set to *Ready to Load*.



**Close**

Click the Close button to access a confirmation page with an appropriate message. If the user clicks OK, the system sets the current cycle status to *Closed*.

The system enables the Close button if the cycle status is *Open* and all groups in the cycle have a status of *Complete* or *Complete with Errors*.

## Cancel Cycle



**Cancel**

Click the Cancel button to set the cycle status to *Cancelled*, the date the cycle was cancelled to the current date, as well as the By field to the ID of the person signed on to the system.

Additionally, the system checks that no groups within the cycle have a group status code of *Complete*. If there are one or more groups that have a group status code of *Complete*, the system displays an error message. You may also see a warning message if the cycle needs to be recalculated. In this case click OK to continue or Cancel to stop processing.

The system enables this button only if the cycle status is *Open* or *Calculated*.

## Analytics

### Compensation Analytics

Click to select to view one of these pivot grids:

- Cycle Tracking
- Cycle Guideline Alert

See [Understanding Compensation Pivot Grids](#).

## Status History

This grid provides you with the current and previous cycle statuses, the dates the cycle were last updated, the IDs of the users, and the names of the users who updated the compensation cycle.

See Also [Cycle Statuses](#)

## Access Rules Page

Use the Access Rules page (WCS\_ECM\_CYC\_PDS) to set the time periods in which managers can review, update, and be notified of changes in the compensation cycle.

### Navigation

Compensation, Compensation Cycles, Administer Cycle, Access Rules

### Image: Access Rules page

This example illustrates the fields and controls on the Access Rules page.

The screenshot shows the 'Access Rules' tab selected. At the top, it displays 'Cycle ID: FOCAL\_2011' and 'Cycle Description: Focal 2011 Salary and Bonus'. Below this, a 'Funding Period' section shows 'Begin: 01/01/2011' and 'End: 12/31/2011', with a 'Description: Focal 2011 Cycle'. The 'Cycle Status' is 'Opened'. The main section is 'Manager Access Periods', which includes a 'Personalize' link, a 'Find' search bar, and pagination controls ('First', '1-4 of 4', 'Last'). A table lists four access periods: 'Notification Period', 'Default', 'Review Period', and 'Update Period'. Each row has columns for '\*Event Display Code', '\*Start Date' (01/01/2011), and '\*End Date' (12/31/2012), along with '+' and '-' buttons for editing.

*Event Display Code	*Start Date	*End Date		
Notification Period	01/01/2011	12/31/2012	+	-
Default	01/01/2011	12/31/2012	+	-
Review Period	01/01/2011	12/31/2012	+	-
Update Period	01/01/2011	12/31/2012	+	-

**Note:** Manager Access Periods control the display of the compensation alerts that are generated, not the period to which the manager has access to enter their proposals. If the cycle is *Open*, the managers will have access to their group(s) based on the access defined on the Administer Cycle Roles page.

## Manager Access Periods

### Event Display Code

Select the event for which you want to set a start and end date.  
Values include:

- *Default*
- *Notification Period*
- *Review Period*



- *Update Period*

### Start Date and End Date

Enter the start and end dates for each event that you add to this page.

## Summary Page

Use the Summary page (WCS\_ECM\_CYC\_SUM) to view a summary of the cycle, including funding period, status, currency, funding amounts, funding percentages, headcounts, and calculated total salaries.

### Navigation

Compensation, Compensation Cycles, Administer Cycle, Summary

### Image: Summary page

This example illustrates the fields and controls on the Summary page.

Administer Cycle	Access Rules	Summary								
Cycle ID FOCAL_2011		Cycle Description Focal 2011 Salary and Bonus								
<b>Funding Period</b>										
Begin	01/01/2011									
End	12/31/2011									
Cycle Status Opened		Currency Code USD								
<b>Funding Overview for Salary Plans</b>										
Description	Calculated Headcount	Calculated Total Salaries	Calculated Amount	Calculated Percent	Qualified Headcount	Qualified Salaries	Funded Amount	Funded Percent	Proposed Amount	Proposed Percent
Merit Increase	11	486,054.40	26,041.00	5.36	11	486,054.40	26,041.00	5.36	25,333.00	5.21
<b>Funding Overview for Award Plans</b>										
Description	Calculated Headcount	Calculated Total Salaries	Calculated Award	Calculated Percent	Qualified Headcount	Qualified Salaries	Funded Award	Funded Percent	Proposed Award	Proposed Percent
Bonus Plan	11	486,054.40	23,730.00	4.88	11	486,054.40	23,730.00	4.88	18,758.00	3.86

### Funding Overview for Salary Plans

After the cycle is built, this grid provides information regarding headcount, salaries, calculated amounts and percents, funded amounts and percents, and proposed amounts and percents.

#### Calculated Percent

This field is equal to the calculated amount divided by the calculated total salaries multiplied by 100 and then rounded to 2 decimal places. The system only displays this field for salary and variable compensation cash plans; otherwise the system does not display it.

#### Funded Percent

This field is equal to the funded amount divided by the adjusted total salaries multiplied by 100 and then rounded to 2 decimal places. The system only displays this field for salary and variable compensation cash plans; otherwise the system does not display it.

#### Proposed Percent

This field is equal to the proposed amount divided by the adjusted total salaries multiplied by 100 and then rounded to 2 decimal places. The system only displays this field for salary

and variable compensation cash plans; otherwise the system does not display it.

## Build Cycle Page

Use the Build Cycle page (WCS\_ECMBUILD\_RCTL) to run the Cycle Build Application Engine program.

### Navigation

Click the Build button on the Administer Cycle page.

### Image: Build Cycle page

This example illustrates the fields and controls on the Build Cycle page.

The screenshot shows a web application window titled "Build Cycle". At the top, it displays "Run Control ID HXCMPALT1\_2008-01-01" and links for "Report Manager" and "Process Monitor". A "Run" button is in the top right. Below this is a section titled "Report Request Parameters" containing a form with the following fields: "Cycle ID" with value "HXCMPALT1", "Funding Period Begin" with value "01/01/2008", and "Cycle Status" with value "Defined". There is a "Recalculate Cycle" checkbox which is currently unchecked. At the bottom of the form are "OK", "Cancel", and "Apply" buttons.

Click the Run button to access the Process Scheduler Request page and launch the Compensation Cycle Build Application Engine.

This process updates the cycle status, deletes old data, reads general parameters, resolves group definitions, creates employee demographic data, creates direct report nodes, create rollup nodes, processes salary plans, processes variable compensation plan information, creates an access table, and updates the cycle status log file.

### Cycle ID

Select the cycle for which you want to run the cycle build and calculation process.

### Funding Period Begin

Select the begin date of the funding period for which you want to run the cycle build and calculation process.

### Recalculate Cycle

Select this check box if you want the system to recalculate a cycle that has already been built and calculated

## Load Salary Updates and Awards Page

Use the Load Salary Updates and Awards page (WCS\_ECMLOAD\_RCTL) to run the Load Salary Updates and Awards Application Engine program.

## Navigation

- Compensation, Compensation Cycles, Load Salary Updates and Awards, Load Salary Updates and Awards
- Click the Load button on the Administer Cycle page.

### Image: Load Salary Updates and Awards page

This example illustrates the fields and controls on the Load Salary Updates and Awards page.

The screenshot shows a web interface for the 'Load Salary Updates and Awards' process. At the top, there are navigation links: 'Run Control ID FY12', 'Report Manager', and 'Process Monitor'. A 'Run' button is located in the top right corner. Below these is a section titled 'Report Request Parameters'. This section contains three fields: 'Cycle ID' with the value 'FOCAL\_2011', 'Funding Period Begin' with the value '01/01/2011', and 'Status' with the value 'Opened'. Each of the first two fields has a magnifying glass icon next to it, indicating a search function.

Click the Run button to access the Process Scheduler Request page and launch the Compensation Cycle Load Application Engine.

This process validates the run control parameters, populates configuration rowsets, creates direct report group rowsets, processes salary increases, processes variable compensation awards, and updates the group status to *Complete*.

#### Cycle ID

Select the cycle for which you want to load salary updates and award information.

#### Funding Period Begin

Select the begin date of the funding period for which you want to load salary updates and award information.

## Process Job Changes Page

Use the Process Job Changes page (WCS\_RULE\_RNCTL) to run the Job Change Application Engine program to capture employee job changes when a cycle is opened.

## Navigation

Compensation, Compensation Cycles, Process Job Changes, Process Job Changes

### Image: Process Job Changes page

This example illustrates the fields and controls on the Process Job Changes page.

Click the Run button to access the Process Scheduler Request page and launch the Job Change Application Engine (WCS\_CYC\_RULE).

This process identifies job changes (selected in the compensation cycle definition) that occurred between the time this process is triggered and the time compensation cycle became opened. Based on the setup, either the system zeros out the funded and proposed amounts given to employees with the job changes, or it will be up to the manager or administrator, upon viewing the alert, to decide what the course of action is.

#### Cycle ID

Select the cycle for which you want to run the process to track job change activities for employees while the cycle is opened.

#### Funding Period Begin

Select the begin date of the funding period used to run the process.

## Manage Cycle Transactions Page

Use the Manage Cycle Transactions page (WCS\_ECM\_MSS\_SUM) to enter the compensation proposal changes for your direct reports or navigate into any of your indirect groups to review their proposals.

## Navigation

Compensation, Compensation Cycles, Manage Cycle Transactions, Manage Cycle Transactions

### Image: Manage Cycle Transactions page

This example illustrates the fields and controls on the Manage Cycle Transactions page.

**Manage Cycle Transactions**

Betty Locherty  
Current Role Compensation Administrator

**Instructions**  
You are viewing Betty Locherty organization's plan data for the Focal 2011 Salary and Bonus with Calculated status. Please review the information below and make recommendations. You may make updates here or drill into each employee's data separately.

Save for Later Discard Changes Submit Mark Ready to Load

Planning Currency USD US Dollar

**Analytics**  
Compensation Analytics

**KU0007\_000**

**Organization Summary Data**

Organizational Summary My Direct Reports

Analytics	Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
Analytics	Merit Increase	11	486,054.40	26,041.00	25,333.00	708.00
Analytics	Bonus Plan	11	486,054.40	23,730.00	18,758.00	4,972.00

**Merit Pay** **Bonus Plan**

**Direct Reports**

Name	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Proposed Annual Rate	Compa-Ratio	Salary Grade	Performance Rating
Channing, Rosanna	<input type="checkbox"/>	72,800.00	5,096.00	7.00	5,096.00	7.00	77,896.00	0.99006		E

**Indirect Reports**

Empl ID and Record	Name	Group Status	Balance	Total Eligible Salaries	Total Funded Amount	Funded Percent	Total Proposed Amount	Proposed Percent	Status Date
KU0046_000	Rosanna Channing	In Progress	708.00	413,254.40	20,945.00	5.07	20,237.00	4.90	06/05/12 5:01PM

### Save for Later

Click this button if you want to save any changes you may have made and review them later. This will update the status of the group proposals to *In Progress*. The system enables this button based on the role of the user and if the group status of the proposal is *Calculated*, *In Progress*, or *Pushed Back*.

### Discard Changes

Click this button if you want to discard any changes you may have made. The system enables this button based on the role of the user and if the group status of the proposal is *Calculated*, *In Progress*, or *Pushed Back*.

### Submit

Click this button to submit any changes you may have made to the upper node or one node up for processing. This will update the group status to *Submitted*. The system enables this button if the user has the Submitter role access and the group status of the proposal is *Calculated*, *In Progress*, or *Pushed Back*.

### Push Back

Click this button to send the proposal back to the last person who had approval authority. The system enables this button based on the role of the user and if the group status is *Submitted*.

**Note:** If you define your Compensation Cycle to use the Approval Workflow Engine (AWE), the system does not enable the Push Back button. This is managed within AWE.

**Confirm**

Click this button to confirm group proposals. The system enables this button based on the role of the user and if the group status is *Submitted*.

**Mark Ready to Load**

Click this button to change the status of the proposal to *Ready to Load*. The system enables this button if the user has been assigned the Compensation Administrator role and the group status has reached the *Confirmed* status.

**Organization Summary Data**

This group box describes or lists the name of the plan, the total number of eligible employees in the plan, the total amount of eligible salaries, the total amount that has been funded for the plan, the total proposed amount for the compensation cycle, and the balance (total funded amount – total proposed amount).

Organization summary data represents a manager's entire organization, including totals from direct and indirect reports.

If the manager has direct reports, the system displays an additional tab called Direct Reports next to the organizational summary. The system does this to tie the organizational summary numbers back to the employees displayed in the lower grid.

**Direct Reports**

This group box describes or lists the names of individuals, indicates if an individual was excluded from the compensation cycle, lists the current salaries of individuals, and provides a field that you can use to adjust the amount of the proposed change in compensation.

**Change Amount**

Enter the amount by which you want to change the individual's compensation and then click the Save for Later button.

The system updates the amount in the Total Proposed Amount field in the Organization Summary Data group box and recalculates the amount in the Balance field.

**Indirect Reports**

Depending on which method that you used to set up your trees (position-based, supervisor based, or tree based), this group box describes or lists basic information regarding the node and when it was changed. It also displays the total amount of eligible salaries, the total amount that has been funded, the total proposed amount for the compensation cycle, the proposed percent, the funded percent, and the balance (total funded amount – total proposed amount).

**Manage Cycle Transactions - Direct Reports Page**

Use the Manage Cycle Transactions - Direct Reports page (WCS\_ECM\_MSS\_DET) to enter compensation proposal changes for individuals.

## Navigation

Click a name link in the Direct Reports section of the Manage Cycle Transactions page.

### Image: Manage Cycle Transactions - Direct Reports page (1 of 2)

This example illustrates the fields and controls on the Manage Cycle Transactions - Direct Reports page (1 of 2).

**Manage Cycle Transactions**  
**Direct Reports**

Name: Rosanna Channing  
Job Title: Senior Manager-Accounting

[Save](#) [Discard](#) [Return](#)

**Employee Information** [Personalize](#) | [Find](#) | [First](#) | [1-5 of 5](#) | [Last](#)

Field Name	Value
Employee ID:	KU0046
Job Code:	600135
Department ID:	13110
Location Code:	KUNY00

[<<](#) [>>](#)

**Salary Proposals** [Personalize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

Plan	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Proposed Annual Rate	Compa-Ratio
Merit Pay	<input type="checkbox"/>	72,800.00	5,096.00	7.00	5,096.00	7.00	77,896.00	0.99

**Other Proposals** [Personalize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

Plan	Exclude	Funded Award	Funded Percent	Proposed Award	Total Cash Awards
Bonus Plan	<input type="checkbox"/>	3,328.00	4.57	3,328.00	3,328.00

### Image: Manage Cycle Transactions - Direct Reports page (2 of 2)

This example illustrates the fields and controls on the Manage Cycle Transactions - Direct Reports page (2 of 2).

**Salary History** [Personalize](#) | [Find](#) | [First](#) | [1-3 of 3](#) | [Last](#)

Employee ID	Record	Date	Action	Reason	Currency Code	Change Amount	Change Percent	Annual	Monthly
KU0046	0	08/29/1986	Hire		USD	0.00	0.00	60,008.00	5,000.66
KU0046	0	07/01/2010	Pay Rate Change		USD	6,552.25	10.91	66,560.00	5,546.66
KU0046	0	07/01/2011	Pay Rate Change		USD	6,240.00	9.37	72,800.00	6,066.66

**Performance History** [Personalize](#) | [Find](#) | [First](#) | [1-7 of 7](#) | [Last](#)

Date	Manager Name	Document Type	Performance Rating
12/31/2008	Betty Locherty	PERFORM	4
12/31/2007	Betty Locherty	PERFORM	3
12/31/2007	Betty Locherty	KOANNUAL	M
12/31/2008	Betty Locherty	KOANNUAL	M
12/31/2009	Betty Locherty	KOANNUAL	E
12/31/2010	Betty Locherty	KOANNUAL	E
12/31/2011	Betty Locherty	KOANNUAL	E

Use this page to enter compensation changes for your individual direct reports.

#### Save

Click this button to save any changes you made have made to the proposal.

#### Discard

Click this button to discard any changes you made have made to the proposal.

**Return**

Click this button to return to the Manage Cycle Transactions page for the group.

**Salary Proposals**

Use this group box to review any changes being proposed to the employee's compensation. You can choose to exclude the employee from the process by selecting the Exclude check box. You can also enter a specific amount in the Change Amount field or decide to enter a percentage in the Proposed Percent field and let the system calculate the amount when you click Save.

**Other Proposals**

Use this group box to review any additional changes being proposed to the employee's compensation. You can choose to exclude the employee from the process by selecting the Exclude check box. You can also enter a specific amount in the Proposed Award field or decide to enter a number in the Modifier field and let the system calculate the amount when you click Save.

---

**Note:** Only an administrator can select the Exclude check box. On the Manager Self-Service pages, users cannot edit this field when it is displayed. An administrator can also use the Compensation Cycle Build process to exclude employees from the cycle.

---

**Salary History**

Use this group box to review the employee's salary history, including date, action reason, change amount, change percent, annual compensation, and monthly compensation.

**Award History**

If the system displays the Award History group box, it displays information regarding the variable compensation award history of the employee.

**Performance History**

If you select ePerformance integration, the system displays a Performance History group box, which displays information regarding dates, manager names, document types, and performance ratings.

---

## Administering Cycle Roles

This section provides an overview of cycle roles and discusses how to administer cycle roles.

**Page Used to Manage Cycle Roles**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Administer Cycle Roles	WCS_ECM_CYC_ROL	Compensation, Compensation Cycles, Administer Cycle Roles, Administer Cycle Roles	Apply or modify compensation roles for groups within a compensation cycle.



## Understanding Cycle Roles

You use this component to capture information necessary to control access to particular compensation cycles by users that have manager and compensation administrator roles. The component should, however, be accessible only to compensation administrators.

---

**Note:** To access this component, the cycle must be in the *Built* or *Open* status.

---

## Administer Cycle Roles Page

Use the Administer Cycle Roles page (WCS\_ECM\_CYC\_ROL) to apply or modify compensation roles for groups within a compensation cycle.

### Navigation

Compensation, Compensation Cycles, Administer Cycle Roles, Administer Cycle Roles

### Image: Administer Cycle Roles page

This example illustrates the fields and controls on the Administer Cycle Roles page.

The screenshot displays the 'Administer Cycle Roles' page. At the top, it shows the 'Cycle ID' as FOCAL\_2011 and the 'Cycle Description' as Focal 2011 Salary and Bonus. Below this is a 'Funding Period' section with 'Begin' date 01/01/2011, 'End' date 12/31/2011, and a 'Description' of Focal 2011 Cycle. The 'Hierarchy' section shows a tree view with 'Betty Locherty' selected, showing 11 total employees and 2 assignments. Below this, a table lists employees under Betty Locherty: Rosanna Channing (10 employees, 1 assignment, In Progress), Edmund Donahue (2 employees, 1 assignment, Pushed Back), and Christelle Stevenson (2 employees, 1 assignment, Confirmed). The bottom section, titled 'Betty Locherty', shows a table of employee assignments with columns for Employee ID, Name, Owner, and Access Type. Two rows are shown for Betty Locherty (KU0007), with roles 'Compensation Adminstr' and 'Submitter'.

Cycle ID	FOCAL_2011	Cycle Description	Focal 2011 Salary and Bonus
<b>Funding Period</b>			
Begin	01/01/2011	Description	Focal 2011 Cycle
End	12/31/2011		

Empl ID and Record	Total Employees	Number of Assignments	Status
Betty Locherty	11	2	Calculated
Rosanna Channing	10	1	In Progress
Edmund Donahue	2	1	Pushed Back
Christelle Stevenson	2	1	Confirmed

Employee ID	Name	Owner	*Access Type
KU0007	Betty Locherty		Compensation Adminstr
KU0007	Betty Locherty		Submitter

### Funding Period

This group box displays the begin and end dates of the cycle and includes a description.

### Hierarchy

This group box lists the total number of employees for each manager, the number of employees that have been assigned access roles, and the status of the cycle for which the manager is responsible. Use the plus and minus symbols to select the reporting group that you want to view.

## <eCompensation Department>, <Manager Name> or <Position Number>

The title of the grid column depends on the type of tree that was used to create the cycle. This group box displays a list of managers and their corresponding roles from the Cycle Access table. The access table is pre-populated when the Cycle Calculation process is run with the manager of each group. The system allows you to add and delete rows since multiple employees can have access to the same group.

### Employee ID

Displays the employee ID of the individual.

---

**Note:** The manager is usually the individual who is designated as the owner of the group.

---

### Name

Displays the name of the individual.

### Owner

Select this check box to indicate who is administering the roles for the reporting group. This check box is used mainly for informational purposes only. Individuals who are designated as *owner* do not get audited when an administrator updates the cycle.

### Access Type

Select the role that you want each individual to have for the compensation cycle. The system writes any changes to the Audit table if anyone other than the owner enters and saves an updated proposal amount.

Values include:

- *Comp Admin* (compensation administrator): The compensation administrator is responsible for the compensation process including cycle definition, funding, proposal submission and compensation updates. This role has view and update capabilities at all levels, including the ability to flag approved groups for implementation.
- *Confirmer*: The confirmer role provides an individual with the ability to confirm submitted proposals for the designated groups within the organizational chain. If you are use AWE, the Confirmer role will not be available.
- *Reviewer*: The person having this role has view-only access to specific groups. Update capabilities are not available to the reviewer role.
- *Submitter*: The submitter role provides an individual with the ability to submit or push back proposals for the designated groups within the organizational chain. When changes are complete, the individual submits requests for approval. The submitted requests are then routed for approval.

## Manually Distributing Funding Information for Cash, Non-Cash and Stock Awards

This section provides an overview on manual funding distribution and discusses how to:

- Enter funding information for cycles by group.
- Enter funding information for individuals.
- Enter funding information for manually funded plans.

### Pages Used to Manually Distribute Funding Information

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Fund Cycle by Group	WCS_ECM_CYC_FBG	Compensation, Compensation Cycles, Fund Cycle by Group, Fund Cycle by Group	Modify calculated funding for a group of employees within a compensation cycle.
Fund Cycle by Individual	WCS_ECM_CYC_FBI	<ul style="list-style-type: none"> <li>• Compensation, Compensation Cycles, Fund Cycle by Individual, Fund Cycle by Individual</li> <li>• Click the Employee Name link on the Fund Cycle by Group page.</li> </ul>	Modify calculated funding for an individual employee within a compensation cycle.
Fund Cycle Manual Plans	WCS_ECM_CYC_FMP	Compensation, Compensation Cycles, Fund Cycle Manual Plans, Fund Cycle Manual Plans	Enter funding for groups within a compensation cycle for manually funded variable compensation plans.

### Understanding Manual Funding Distribution

This component is used to manually enter cash, non-cash, and stock award data for variable compensation plans that have been configured with the funding calculation set to *Manual*. The pages are display only unless the Cycle Status is equal to *Defined* or *Canceled*.

### Fund Cycle by Group Page

Use the Fund Cycle by Group page (WCS\_ECM\_CYC\_FBG) to modify calculated funding for a group of employees within a compensation cycle.

## Navigation

Compensation, Compensation Cycles, Fund Cycle by Group, Fund Cycle by Group

### Image: Fund Cycle by Group page

This example illustrates the fields and controls on the Fund Cycle by Group page.

### Fund Cycle by Group

Cycle ID HXCMPBLT2

Cycle Description Cycle Built 2

Funding Period

Begin 01/01/2008

End 12/31/2008

Description Cycle Built 2 2008


Department ID HXCMPDEPT2

eCompensation - Department 2

Display Name No Primary Manager


Currency Code USD

Funding Summary


Personalize | Find |  First 1-3 of 3 Last



Description	Total Headcount	Total Salaries	Qualified Headcount	Qualified Salaries	Calculated Amount	Calculated Percent	Funded Amount	Funded Percent
Direct Reports	2	100,000.00	2	100,000.00	5,000.00	5.00	5,000.00	5.00
Indirect Reports	5	250,000.00	4	200,000.00	10,000.00	5.00	10,000.00	5.00
Total Reports	7	350,000.00	6	300,000.00	15,000.00	5.00	15,000.00	5.00

Direct Reports Funding Detail ?

Personalize | Find |  First 1-2 of 2 Last

Funding Information

Employee Information 

Name	Exclude	Baseline Percent	Proration Factor	Calculated Amount	Funded Amount	Funded Percent
Chan, Gary		5.00	1.000000	2500.00	2500.00	5.00
Ghosh, Remo		5.00	1.000000	2500.00	2500.00	5.00

## Funding Summary

This group box displays the number of direct reports, indirect reports and total reports in the Total Headcount column. It also lists total salaries for each class of employee, the number of employees who qualify to participate in the cycle, their total salaries, the calculated amount, the calculated percent, the funded amount, and the funded percent. To reveal this information for other plans, click the tabs displayed at the top of the group box.

**Note:** Click Save to update the Qualified Headcount, Qualified Salaries, Calculated Percent, and Funded Amount fields for each plan within the group and groups that own the selected group.

**Note:** Root node employees (usually managers) are included in the head counts for indirect reports and salaries. However, they should not be able to update their own data. The compensation administrator, however, can exclude top node employee from funding and the cycle. If they do exclude these employees, the compensation administrator can use the Manage Cycle Transactions page to update the proposals for root node employees, as well as the other employees that cannot be associated to any of the tree nodes in the cycle.

## Direct Reports Funding Detail - Funding Information

**Name** Displays the name of the employee in the group. Click this link to access the Fund Cycle by Individual page.

<b>Exclude</b>	Select this check box if you want to exclude this employee from the funding cycle.
<b>Baseline Percent</b>	Displays the baseline percent that was established when the cycle was built.
<b>Proration Factor</b>	Displays the proration factor that was established before the cycle was built.
<b>Calculated Amount</b>	Displays the amount of the increase that was calculated based on the employee's current salary, baseline percent, and proration factor.
<b>Funded Amount</b>	Displays the amount that was funded based on the employee's current salary, baseline percent, and proration factor. Use this field to adjust the amount that is displayed in this field.
<b>Funded Percent</b>	Displays the percent of the amount funded in relation to the current salary and funded amount for the employee. To calculate this number the system divides the amount in the employee's Funded Amount field by the amount in the employee's Current Salary field.

### Direct Reports Funding Detail - Employee Information

<b>Name</b>	Displays the name of the employee in the group. Click this link to access the Fund Cycle by Individual page.
<b>Exclude</b>	Select this check box if you want to exclude this employee from the funding cycle.
<b>Employee ID</b>	Displays the ID of the employee.
<b>Empl Record</b>	Displays the employment record of the employee.
<b>Company</b>	Displays the company code associated with the employee.
<b>Job Code</b>	Displays the code associated with the employee.
<b>Salary Plan</b>	Displays the salary plan associated with the employee.
<b>Salary Grade</b>	Displays the salary grade associated with the employee.
<b>Current Salary</b>	Displays the employee's current salary.

### Fund Cycle by Individual Page

Use the Fund Cycle by Individual page (WCS\_ECM\_CYC\_FBI) to modify calculated funding for an individual employee within a compensation cycle.

## Navigation

- Compensation, Compensation Cycles, Fund Cycle by Individual, Fund Cycle by Individual
- Click the Employee Name link on the Fund Cycle by Group page.

## Image: Fund Cycle by Individual page

This example illustrates the fields and controls on the Fund Cycle by Individual page.

**Fund Cycle by Individual**

Cycle ID	Cycle Description	Cycle Built
HXCMPBLT		

**Funding Period**

Begin	01/01/2008	Description	Period 2008
End	12/31/2008		

Empl ID and Record: HXCMPPEE60\_000      Jack Chan

Node Status: Calculated

**Individual Data**

Name	Diana Lee	Job Title	ecomensation Job code
Employee ID	HXCMPPEE62	Department	eCompensation - Department 11
Empl Record	0	Business Unit	HXBU1
Last Start Date	01/01/2000	Location	eCompensation Location
Empl Status	Active	Notes	

☐ Exclude All

**Salary Plans**

Exclude	Description	Calculated Amount	Funded Amount
<input type="checkbox"/>	SAL_PLAN_1	2500.00	2500.00

## Funding Period

This group box provides the begin and end dates for the cycle as well as a description. The fields in this group box are display only.

## Individual Data

This group box provides information about the employee, including Name, Job Title, Employee ID, Department, Empl Record, (employee record) Business Unit, Last Start Date, Location, and Empl Status (employee status).



**View Notes**

Click the View Notes button to access the Notepad page where you can enter additional information regarding the individual and their compensation.

## Exclude All

Select this check box if you want to exclude the individual from receiving any additional monies under their salary or award plans for this cycle. The system selects all the Exclude check boxes that appear on the page and prevents users from entering information in the Funded Amount and Funded Award fields.

## Salary Plans

### Exclude

Select this check box if you want to exclude the individual from receiving any additional monies under their salary plan for this cycle.

### Description

Displays a description of the salary plan.

### Calculated Amount

Calculated during the cycle build process, this field displays the suggested amount by which you can increase the individual's salary.

### Funded Amount

Enter the amount by which you want to increase the individual's salary.

## Award Plans

This group box displays award plan information for the individual. The fields in this group box are nearly the same as those in the Salary Plans group box. For more information on the fields displayed in this group box, refer to the field descriptions under the Salary Plans section.

## Fund Cycle Manual Plans Page

Use the Fund Cycle Manual Plans page (WCS\_ECM\_CYC\_FMP) to enter funding for groups within a compensation cycle for manually funded variable compensation plans.

### Navigation

Compensation, Compensation Cycles, Fund Cycle Manual Plans, Fund Cycle Manual Plans

### Image: Funding Cycle Manual Plans page

This example illustrates the fields and controls on the Funding Cycle Manual Plans page.

**Fund Cycle Manual Plans**

Cycle ID: HXCMPBLT8      Cycle Description: Cycle Built 8

**Funding Period**

Begin: 01/01/2008      Description: Cycle Built 8 2008

End: 12/31/2008

VC PLAN 10    VC PLAN 11

**Adjusted Funding**

Total Qualified Headcount: 11      Amount to Allocate:

Total Salaries: 475000.00      Funding Allocated: 0.00

Currency Code: USD      Available Funding: 0.00

**Manual Funding** ?      Personalize | Find | View All |       First 1-5 of 5 Last

Department ID	Total Qualified Headcount	Direct Headcount	Total Salaries	Organizational Total Amount	Allocation Amount
+ eCompensation - Department 10	11	2	475000.00		<input type="text"/>
- eCompensation - Department 3	2	2	85000.00		<input type="text"/>
- eCompensation - Department 2	7	2	320000.00		<input type="text"/>
- eCompensation - Department 5	3	3	135000.00		<input type="text"/>
- eCompensation - Department 4	2	2	85000.00		<input type="text"/>

## Funding Period

This group box provides the begin and end dates for the cycle as well as a description. The fields in this group box are display only.

## Adjusted Funding

This group box provides information about the funding for the cycle, including information about headcounts, salaries, funding, and currency.

<b>Amount to Allocate</b>	Use this field to enter the amount that you want to manually allocate to the departments for the cycle that is displayed. When you click Save or click on an enterable field, the system displays the amount in the Available Funding field.
<b>Funding Allocated</b>	Displays the total funding that was allocated in the Allocation Amount fields in the Manual Funding group box.
<b>Available Funding</b>	Displays the total amount of available funding that remains after the system subtracts the funding allocated amount from the amount to allocate.

## Manual Funding

<b>Group Title</b>	Displays the name and the ID of the reporting group. If the group is based on Supervisor, the system displays the employee ID. If the group is based on Department, the system displays the department ID.
<b>Total Qualified Headcount</b>	Displays the total number of employees that are qualified for additional compensation for the reporting group for this cycle.
<b>Direct Headcount</b>	Displays the total number of direct reports that are included in the reporting group for this cycle.
<b>Total Salaries</b>	Displays the total salaried amount provided to employees within each reporting group that is displayed.
<b>Allocation Amount</b>	<p>Enter the amount that you want to allocate to the reporting group to fund employee compensation for the cycle. The system displays the amount in the Funding Allocated field in the Adjusted Funding group box.</p> <p>When additional amounts are added for other groups, the system adds all the amounts you entered to the Funding Allocated field.</p>



# Approvals and Delegations Integration

---

## Understanding Approvals and Delegations in Compensation

eCompensation Manager Desktop provides approval and access role delegation transactions that can be implemented to allow an individual to specify a proxy to act on their behalf. For compensation cycles, when an access role is delegated and the proxy accepts the delegation, the system initiates the Maintain Delegated Role Access process to load the proxies into the cycle access roles structure.

Using the Approvals Framework with Compensation allows you to implement your own set of approvals rules. The system enables you to define as many levels of approvals as you want; or you can decide to not have any level of approvals (auto approve).

Compensation delivers an Approval Process ID as system data, which handles Compensation-specific validations and code needed to integrate with AWE. Compensation also delivers a set of functional rules called Approval Definition IDs. These functional rules were created to demonstrate and test the product integration to AWE. You can define your own set of approval rules that fit your own business process needs.

For Delegations the system enables eCompensation Manager Self Service users to delegate tasks regarding compensation. For instance a submitter can provide the ability to delegate their task to someone within or outside their hierarchical organization. In addition, a reviewer can delegate a task to another individual within the organization.

The Allocate Compensation - Select Activities by Cycle page allows you to select an activity for which another individual has given you authority to work on.

### Related Links

"Understanding Delegation (*PeopleSoft HCM 9.2: Application Fundamentals*)"



## Chapter 7

# Allocating Compensation Information

## Allocating Compensation

This section discusses how to:

- Select compensation activities.
- Allocate compensation for direct and indirect reports.
- Allocate compensation for direct reports.
- Allocate compensation for indirect reports.
- View job change alerts.

## Pages Used to Allocate Compensation

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Allocate Compensation - Select a Compensation Activity	WCS_ECM_MSS_HOME	Manager Self Service, Compensation and Stock, Allocate Compensation, Allocate Compensation - Select a Compensation Activity	Review the status of the compensation cycles for which you have a role.  This page displays the compensation cycle, a description of the group associated with the cycle, the role of the manager who accessed the page, and the status of the compensation cycle.
Allocate Compensation	WCS_ECM_MSS_SUM	Click the link associated with the cycle that you want to update on the Allocate Compensation - Select a Compensation Activity page.	Enter changes to the proposed compensation amounts allocated to your direct reports. You can also navigate into any of your indirect groups to review their proposals.
Allocate Compensation - Direct Reports	WCS_ECM_MSS_DET	Click the link associated with the direct report (employee) for which you to change or update compensation information on the Allocate Compensation page.	Enter changes to the proposed compensation amounts allocated to your direct reports and view additional details.
Allocate Compensation ( indirect reports)	WCS_ECM_MSS_SUM	Click the link associated with the team that you want to update on the Allocate Compensation page.	Enter changes to the proposed compensation amounts allocated to your indirect reports.
Job Changes	WCS_ECM_RUL_DET	Click the View Alert icon on the Allocate Compensation page.	View details about the job change that took place for an employee.

## Allocate Compensation - Select a Compensation Activity Page

Use the Allocate Compensation - Select a Compensation Activity page (WCS\_ECM\_MSS\_HOME) to review the status of the compensation cycles for which you have a role.

### Navigation

Manager Self Service, Compensation and Stock, Allocate Compensation, Allocate Compensation - Select a Compensation Activity

### Image: Allocate Compensation - Select a Compensation Activity page

This example illustrates the fields and controls on the Allocate Compensation - Select a Compensation Activity page.

Allocate Compensation  
**Select a Compensation Activity**  
Review and allocate compensation for your Employees.  
Rosanna Channing

Instructions

Select the Cycle Name link to perform actions for the activities listed below.

My Compensation Alerts
Personalize | Find |

Created	Message	Delete
06/05/2012	A compensation cycle is now open and ready for your review. You can update with your proposals.	
06/05/2012	A completed proposal recommendation has been submitted to you for your review.	
06/05/2012	A completed proposal recommendation has been submitted to you for your review.	

My Compensation Activities ?
Personalize | Find |

Cycle Name	Group Name	Role	Status
<a href="#">Focal 2011 Cycle</a>	Rosanna Channing	Submitter	In Progress

[Return To Manager Self Service](#)  
[Return to Compensation and Stock](#)

### My Compensation Alerts

This section displays compensation alerts and notifications, if any, for the manager.

See [Compensation Alerts](#).

### My Compensation Activities

This section displays the compensation cycle, a description of the group associated with the cycle, the role of the manager who accessed the page, and the status of the compensation cycle.

Click the link under the Cycle Name column to access the Allocate Compensation page.

## Allocate Compensation Page

Use the Allocate Compensation page (WCS\_ECM\_MSS\_SUM) to enter changes to the proposed compensation amounts allocated to your direct reports.

You can also navigate into any of your indirect groups to review their proposals.

## Navigation

Click the link associated with the cycle that you want to update on the Allocate Compensation - Select a Compensation Activity page.

### Image: Allocate Compensation page (1 of 2)

This example illustrates the fields and controls on the Allocate Compensation page (1 of 2).

**Allocate Compensation**  
Rosanna Channing  
Current Role Submitter

**Instructions**  
You are viewing Rosanna Channing organization's plan data for the Focal 2011 Salary and Bonus with In Progress status. Please review the information below and make recommendations. You may make updates here or drill into each employee's data separately.

Save for Later Discard Changes Submit

Planning Currency USD US Dollar

**KU0046\_000**

**Organization Summary Data**

Analytics	Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
▼ Analytics	Merit Increase	10	413,254.40	20,945.00	20,237.00	708.00
▼ Analytics	Bonus Plan	10	413,254.40	20,402.00	15,430.00	4,972.00

### Image: Allocate Compensation page (2 of 2)

This example illustrates the fields and controls on the Allocate Compensation page (2 of 2).

**Merit Pay Bonus Plan**

**Direct Reports**

Name	View Alert	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Proposed Annual Rate	Compa-Ratio	Salary Grade	Performance Rating
Donahue, Edmund		<input type="checkbox"/>	62,400.00	1,872.00	3.00	624.00	1.00	63,024.00	0.85 006	N	
Lee, Mei		<input type="checkbox"/>	40,040.00	2,002.00	5.00	2,002.00	5.00	42,042.00	0.76 005	M	
Quilligan, Shawn		<input type="checkbox"/>	48,006.40	1,440.00	3.00	480.00	1.00	48,486.40	0.92 005	N	
Reese, Daryl		<input type="checkbox"/>	40,560.00	4,056.00	10.00	4,056.00	10.00	44,616.00	0.97 004	C	
Stevenson, Christelle		<input type="checkbox"/>	26,000.00	1,300.00	5.00	1,300.00	5.00	27,300.00	0.85 003	M	

**Indirect Reports**

Empl ID and Record	Name	Group Status	Balance	Total Eligible Salaries	Total Funded Amount	Funded Percent	Total Proposed Amount	Proposed Percent	Status Date
KU0102_000	Edmund Donahue	Pushed Back	-1,500.00	87,048.00	3,152.00	3.62	4,652.00	5.34	06/05/12 5:03PM
KU0020_000	Christelle Stevenson	Confirmed	0.00	53,040.00	3,192.00	6.02	3,192.00	6.02	06/05/12 5:02PM

Return to Message & Alerts

#### Save for Later

Click this button if you want to save any changes you may have made and return to them at a later date.

#### Discard Changes

Click this button if you want to discard any changes you may have made.

#### Submit

When you click this button, the system sets the group status to *Submitted*. If the application is configured to alert other users to the changed status, it will send out an alert. The system only enables the Submit button if all the indirect groups are marked as *Submitted*.

#### Push Back

When you click this button, the system sets the group status to *Pushed Back*. If the application is configured to alert other users

to the changed status, it will send out an alert. The system only enables the Push Back button for groups that are in a *Submitted* status.

---

**Note:** The system hides this button in Funding mode. This button is also hidden if the user has display-only access and if the user is not either the approver or manager of the immediate group.

---

## Confirm

Click this button to confirm and save any changes that may have been made to the proposal. The system displays this button only to those individuals that have Confirmer access role assigned for the selected group node.

---

**Note:** The Confirm button is hidden if the AWE framework is enabled.

---

## Planning Currency

This field comes from the Currency sub-page. The system hides this field, however, if the cycle does not allow currency conversion. The system converts all monetary values from the base currency (stored values) to the selected currency (derived values).

## Display Individual Data In

When you initially access this page, the system defaults this field to *Paid Currency*. To change the view of the amounts being proposed, select *Plan Currency*.

This field appears if the Enable Currency Conversion field on the Self-service page of the Define Compensation Cycles component is selected.

---

**Note:** The system displays data in the Organizational Summary and Indirect Reports sections in the planning currency. Direct Reports are displayed in the paid currency. Currency amounts are displayed with 2 decimals.

---

See Also [Define Compensation Cycles - Self-Service Page](#)

## Analytics

Click to select one of these pivot grids to view:

- Compensation Distribution
- Salary Analysis

See [Understanding Compensation Pivot Grids](#).

## Organization Summary Data

This group box displays the name of the plan, the total number of eligible employees, the total number of all eligible salaries, the total funded amount, the total proposed amount, and the balance. To view the same information for your direct reports, click the My Direct Reports tab.

## Analytics

Click to select one of the these pivot grids:

- Salary Increase by Performance (available for salary plans only)
- Variable Compensation by Performance (available for cash-type variable compensation plans only)

See [Understanding Compensation Pivot Grids](#).

## Direct Reports

Use fields in this group box to access the Allocate Compensation - Direct Reports page for individuals, add notes, exclude employees from the compensation cycle, and change compensation amounts for individual employees. The display of fields in this group box is configured on the Self-service page of the compensation cycle definition.

### Name

To access the Allocate Compensation - Direct Reports page, click the name of the employee under the Name column.

### View Alert

Click to access the Job Changes page in a modal window and view the alert message prepared for the employee.

See [Job Changes Page](#).

### Exclude

Select this check box if you want to exclude an employee from the compensation cycle.



### Add Notes

Click the Add Notes button to access the Notepad page.

### Change Amount

Enter the amount by which you want to change the employee's compensation. The system displays the amount in the Total Proposed Amount field in the Organization Summary Data group box when you click out of the field.

As you make additional changes, the system adds the last change to the previous one until you have completed all the changes for the group displayed and saved or submitted the proposal.

In addition, the system updates the amounts in the Balance and the Proposed Percent fields.

### Proposed Percent

Enter the percentage by which you want to change the employee's compensation. The system changes the amount in the adjacent Change Amount field, updates the amount in the Total Proposed Amount field, and then either adds or subtracts the amount from the Balance field in the Organization Summary Data group box.

## **Indirect Reports**

Use this group box to view compensation and group status information for the teams that report to you. To access the Allocate Compensation (indirect reports) page for a particular team, click the ID of the team under the Empl ID and Record(employee ID and record) column.

## **Allocate Compensation - Direct Reports Page**

Use the Allocate Compensation - Direct Reports page (WCS\_ECM\_MSS\_DET) to enter changes to the proposed compensation amounts allocated to your direct reports and view additional details.



## Navigation

Click the link associated with the direct report (employee) for which you to change or update compensation information on the Allocate Compensation page.

### Image: Allocate Compensation - Direct Reports page (1 of 2)

This example illustrates the fields and controls on the Allocate Compensation - Direct Reports page (1 of 2).

Allocate Compensation  
Direct Reports

Name Shawn Quilligan  
Job Title Analyst-Financial

Save Discard Return

Employee Information		Personalize	Find	First	1-5 of 5	Last
Field Name	Value					
Employee ID:	KU0039					
Job Code:	140035					
Department ID:	13110					
Location Code:	KUNY00					

Salary Proposals

Plan	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Proposed Annual Rate	Compa-Ratio
Merit Pay	<input type="checkbox"/>	48,006.40	1,440.00	3.00	480.00	1.00	48,486.40	0.92

### Image: Allocate Compensation - Direct Reports page (2 of 2)

This example illustrates the fields and controls on the Allocate Compensation - Direct Reports page (2 of 2).

Other Proposals

Plan	Exclude	Funded Award	Funded Percent	Proposed Award	Total Cash Awards
Bonus Plan	<input type="checkbox"/>	2,400.00	5.00	400.00	400.00

Salary History

Employee ID	Record	Date	Action	Reason	Currency Code	Change Amount	Change Percent	Annual	Monthly
KU0039	0	02/16/1986	Hire		USD	0.00	0.00	96,012.80	8,001.06
KU0039	0	01/01/2003	Pay Rate Change	Other	USD	-48,006.40	-50.00	48,006.40	4,000.53

Performance History

Date	Manager Name	Document Type	Performance Rating
12/31/2001	Betty Locherty	KOMERIT1	N
12/31/2008	Rosanna Channing	PERFORM	3
12/31/2007	Rosanna Channing	PERFORM	3
12/31/2006	Rosanna Channing	PERFORM	3
12/31/2011	Rosanna Channing	KOANNUAL	N

The system populates the fields on the page from data residing in the proposal grids on the Direct Report Details page for the individual.

The page also contains additional grids populated with historical data from the Job and Variable Compensation Award tables. The system copies general employee information from selected proposal rows.

The system populates the proposals grids by copying rows from the corresponding direct report grid for the selected employee. If you modify any fields on the page the system copies the information back to the

corresponding direct report proposal grid and row. The system enables users to update proposed amounts unless they have display only access.

**Note:** For specific information regarding the fields displayed on this page, refer to the field descriptions in the previous section.

## Allocate Compensation Page (Indirect Reports)

Use the Allocate Compensation page (Indirect Reports) (WCS\_ECM\_MSS\_SUM) to enter changes to the proposed compensation amounts allocated to your indirect reports.

### Navigation

Click the link associated with the team that you want to update on the Allocate Compensation page.

### Image: Allocate Compensation page (Indirect Reports) (1 of 2)

This example illustrates the fields and controls on the Allocate Compensation page (Indirect Reports) (1 of 2).

**Allocate Compensation**

Rosanna Channing  
Current Role Submitter

**Instructions**

You are viewing Edmund Donahue organization's plan data for the Focal 2011 Salary and Bonus with Pushed Back status. Please review the information below and make recommendations. You may make updates here or drill into each employee's data separately.

Save for Later Discard Changes Submit

Planning Currency USD US Dollar

Analytics  
▼ Compensation Analytics

KU0046\_000 > KU0102\_000

### Image: Allocate Compensation page (Indirect Reports) (2 of 2)

This example illustrates the fields and controls on the Allocate Compensation page (Indirect Reports) (2 of 2).

**Organization Summary Data** (?)

My Direct Reports (777)

Analytics	Plan	Total Eligible Employees	Total Eligible Salaries	Total Funded Amount	Total Proposed Amount	Balance
▼ Analytics	Merit Increase	2	87,048.00	3,152.00	4,652.00	-1,500.00
▼ Analytics	Bonus Plan	2	87,048.00	4,300.00	4,300.00	0.00

Merit Pay Bonus Plan

**Direct Reports** (?)

Name	Exclude	Current Salary	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Proposed Annual Rate	Compa-Ratio	Salary Grade	Performance Rating
Francisco, Brenton	<input type="checkbox"/>	27,040.00	1,352.00	5.00	1,352.00	5.00	28,392.00	0.88 003		M
Religioso, Steve	<input type="checkbox"/>	60,008.00	1,800.00	3.00	3,300.00	5.50	63,308.00	1.15 005		N

Personalize Find View All (23) First 1-2 of 2 Last

Return to Message & Alerts

This page displays funded and proposed summary information for each salary plan and variable compensation plan configured within a given cycle. The system computes summary information from indirect reports only. It does not include subgroups. The system also uses this page to display employee detail information. The detail information shown is specific to the selected salary or variable compensation plan. The system enables users to update proposed amounts unless they have display only access.

**Note:** For specific information regarding the fields displayed on this page, refer to the field descriptions in the Allocating Compensation for Direct and Indirect Reports section.

## Job Changes Page

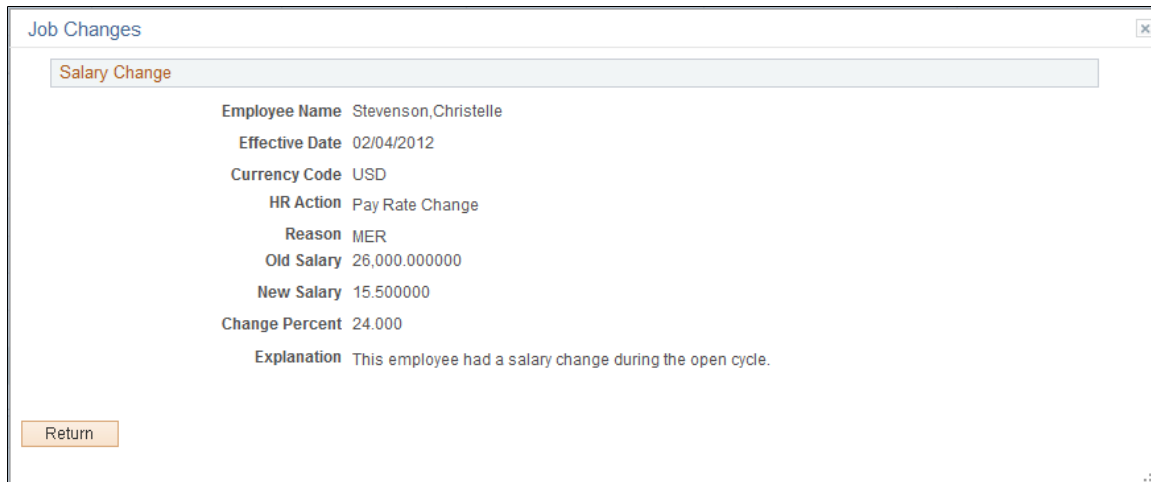
Use the Job Changes page (WCS\_ECM\_RUL\_DET) to view details about the job change that took place for an employee.

### Navigation

Click the View Alert icon on the Allocate Compensation page.

### Image: Job Changes page

This example illustrates the fields and controls on the Job Changes page.



The screenshot shows a web application window titled "Job Changes". Inside, there is a section header "Salary Change" in a light blue box. Below this, the following details are listed:

Employee Name	Stevenson,Christelle
Effective Date	02/04/2012
Currency Code	USD
HR Action	Pay Rate Change
Reason	MER
Old Salary	26,000.000000
New Salary	15.500000
Change Percent	24.000
Explanation	This employee had a salary change during the open cycle.

At the bottom left of the window is a "Return" button.

This page displays details of the job change that occurred to the corresponding employee. It was recorded by the Job Change AE process.

If more than one job change has occurred to an employee (for example, a salary increase in a different currency code, the information for each job change type appears on this page in separate sections (Salary Change, Currency Change, and HR Status Change).



# Working with Pivot Grids in Compensation

## Understanding Compensation Pivot Grids

PeopleSoft Pivot Grid is a PeopleTools technology that provides operational dashboard reporting. Pivot Grids are self-service, multi-dimensional analytics built into the applications that provide users with improved analytic capabilities and the business intelligence needed to make informed decisions. Compensation leverages this functionality and builds pivot grids that will streamline the process of viewing and analyzing data for users in compensation cycles.

Using pivot grids:

- Managers can view salary information in a graphical format to better understand the overall compensation levels of their employees. They are able to view and compare the performance rating and compensation levels of their direct and indirect reports to ensure that their employees are being compensated equitably according to their performance.
- Administrators are able to keep track of the status of all salary proposals within a compensation cycle, as well as identify the proposals that are outside the recommended guidelines that need follow-up.

Compensation delivers a number of pivot grids to provide quick, real-time reporting capabilities to administrators and managers during a compensation cycle. By default, they are displayed as charts but users can change to the display option easily to have them presented in the grid format.



[Pivot Grid Overview](#)



[PeopleSoft Actionable Operational Analytics](#)

For more information on the setup and capabilities of PeopleSoft Pivot Grid, see *PeopleTools: PeopleSoft Pivot Grid*.

## Delivered Compensation Pivot Grids (Available on the Allocate Compensation Page)

### Salary Increase by Performance

This chart shows the percentage or amount allocated for all direct and indirect reports of a manager within a particular compensation cycle, broken down by performance rating. It helps managers to reward their employees commensurate with their performance level.

This pivot grid is available only for salary plans.

## Variable Compensation by Performance

This chart shows the amount allocated for all direct and indirect reports of a manager for a specific cash type variable compensation plan within a particular compensation cycle, broken down by performance rating. Its functions are similar to the Salary Increase by Performance pivot grid except that it is built for cash-type variable compensation plans.

## Salary Analysis

This chart shows a comparison of salary compensation for all of a manager's employees, broken down by employee. Managers can drill into each data segment (bar, pie wedge, and so on) in the chart to view each employee's salary data and see how their team members compare to each other with respect to compensation.

## Compensation Distribution

This chart shows how the salary amounts of a manager's direct reports are distributed within their salary range. Managers can see where their employees are compared to their salary minimum, maximum and midpoint. They can drill into each data segment in the chart to view the compensation distribution of employees by job family or proposal status.

## Delivered Compensation Pivot Grids (Available on the Administer Compensation Page)

### Cycle Guidelines

This chart shows the numbers of allocation proposals that fall within and outside of the recommended guidelines, as defined by the minimum and maximum salary increase percentages. It provides drill-through capability for administrators to view the data by proposal status, group node, department, location, salary plan and so on. Administrators can use the group node entry to see who they might later want to follow up with regarding any proposals that fall outside the recommended guidelines.

### Cycle Tracking

This chart shows the total number of proposals, broken down by proposal status. It provides drill-through capability for administrators to view the data by location, job code, employee, and so on. When necessary, they can notify the appropriate people (shown in group node) regarding issues they find in the proposals.

---

## Viewing Compensation Pivot Grids

This section lists the common elements used in this section, and discusses how to:

- View the Salary Increase by Performance pivot grid (allocate compensation).
- View the Variable Compensation by Performance pivot grid (allocate compensation).
- View the Salary Analysis pivot grid (allocate compensation).
- View the Compensation Distribution pivot grid (allocate compensation).
- View the Cycle Guideline Alert pivot grid (administer compensation).

- View the Cycle Tracking pivot grid (administer compensation).

## Pages Used to View Compensation Pivot Grids

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Allocate Compensation	WCS_ECM_MSS_SUM	Manager Self Service, Compensation and Stock, Allocate Compensation, Allocate Compensation	Access Compensation pivot grids.
Salary Increase by Performance	PTPG_PGVIEWER	Click the Analytics link of a salary plan (like Merit Increase) and then the Salary Increase by Performance link on the Allocate Compensation page.	View the Salary Increase by Performance pivot grid.
Variable Compensation by Performance	PTPG_PGVIEWER	Click the Analytics link of a cash-type variable compensation plan (like Bonus Plan) and then the Variable Compensation by Performance link on the Allocate Compensation page.	View the Variable Compensation by Performance pivot grid.
Salary Analysis	PTPG_PGVIEWER	Click the Compensation Analytics link and then the Salary Analysis link on the Allocate Compensation page.	View the Salary Analysis pivot grid.
Compensation Distribution	PTPG_PGVIEWER	Click the Compensation Analytics link and then the Compensation Distribution link on the Allocate Compensation page.	View the Compensation Distribution pivot grid.
Administer Cycle	WCS_ECM_CYC_ADM	Compensation, Compensation Cycles, Administer Cycle, Administer Cycle	Access Compensation pivot grids.
Cycle Guideline Alert	PTPG_PGVIEWER	Click the Compensation Analytics link and then the Cycle Guideline Alert link on the Administer Cycle page.	View the Cycle Guideline Alert pivot grid.
Cycle Tracking	PTPG_PGVIEWER	Click the Compensation Analytics link and then the Cycle Tracking link on the Administer Cycle page.	View the Cycle Tracking pivot grid.

## Common Elements Used in This Section



### Options Menu

Click to open the Options Menu and select an action to perform on the pivot grid or chart.

### Prompts

Click to access the Datasource Prompts page to view or change the Query prompts used for the pivot grid.

### View Grid

Click to view data in the grid format in a new modal window. You can change how data is presented in the grid by dragging and dropping segment data to a different axis.

### Export Data

Click to export the underlying PSQuery data into a spreadsheet.

### Chart Options

Click to open the User Charting Options page where you can change the chart layout, information displayed on chart axes, and filters.

For more information on the available chart options, see the product documentation for *PeopleTools: PeopleSoft Pivot Grid*.

**Save**

Click to save the current grid and chart layout as the default view of the current model.

**Filters**

Displays the filtering fields that are selected in the chart options. Users can use the available filters to change the data to be displayed in the pivot grid or chart.

**Pivot Grid Chart****Types**

Click to display data in the chart type represented by the icon. Available chart types include vertical bar (default value), line, pie and horizontal bar

## Salary Increase by Performance Page

Use the Salary Increase by Performance page (PTPG\_PGVIEWER) to view the Salary Increase by Performance pivot grid.



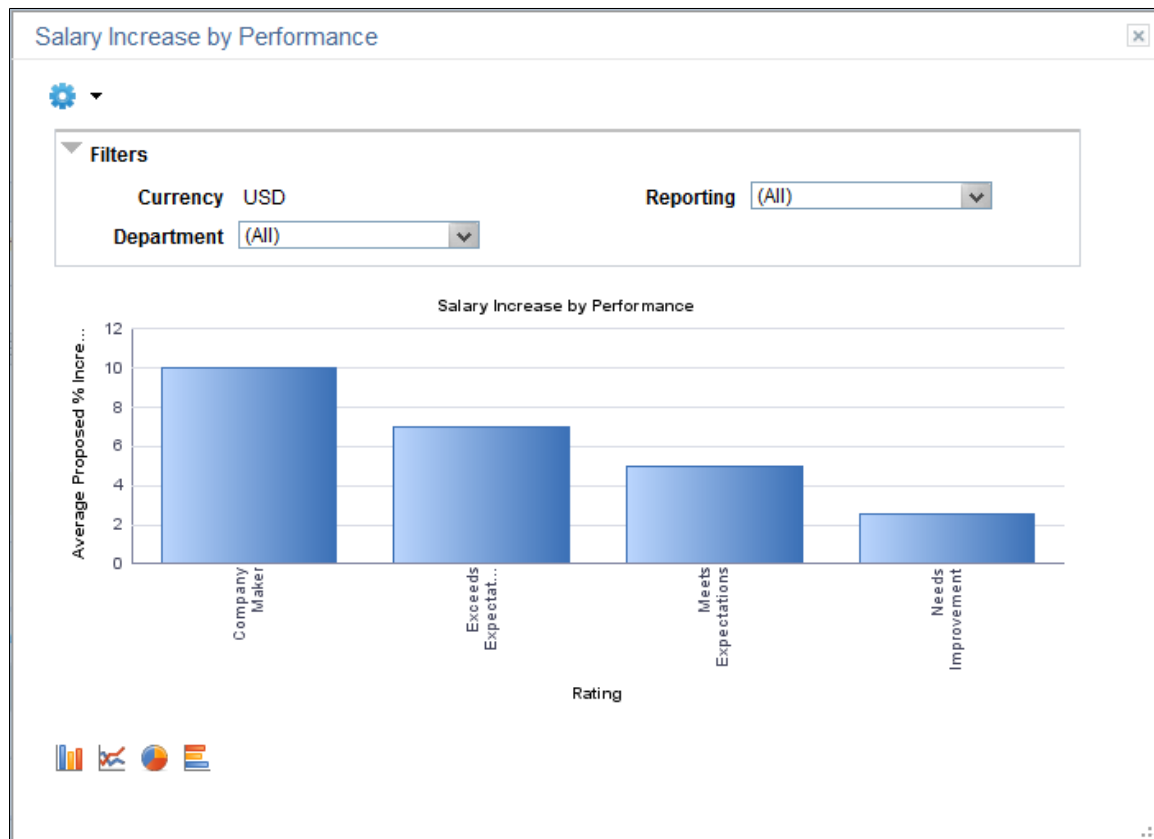
## Navigation

Manager Self Service, Compensation and Stock, Allocate Compensation

Click the Analytics link of a salary plan (like Merit Increase) and then the Salary Increase by Performance link on the Allocate Compensation page.

### Image: Salary Increase by Performance pivot chart

This example illustrates the fields and controls on the Salary Increase by Performance pivot chart.





You can click a bar to see the detailed view of the data represented by that bar in a grid:



### Image: Detailed View of the Salary Increase by Performance pivot grid

This example illustrates the fields and controls on the Detailed View of the Salary Increase by Performance pivot grid.

Pivot Grid Drilldown

Detailed Data

Personalize | Find | View All |  | 

First  1 of 1  Last

Employee	Rating Description	Rating	Rating Type	Proposed Amount	Proposed % Increase	Currency	Min %	Max %	Reporting	Job Code	Department
1 Reese, Daryl	Company Maker	C	REVIEW_RATING	4056.000000	10.00	USD	5.00	12.00	Directs	Analyst-Financial	Corporate Accounting

Return

## Information Displayed in the Salary Increase by Performance Pivot Grid

The Salary Increase by Performance pivot grid provides managers a snapshot of the proposed salary increase percentage for each performance rating. They can drill down into a performance rating to find out how many employees (direct and indirect reports) fall into that rating and who they are. Information provided in this pivot grid allows managers to reward their employees commensurate with their performance level.

---

**Important!** In order for performance data to be retrieved for use in this pivot grid, integration with PeopleSoft ePerformance is required.

---

When viewed in the grid format, this pivot grid displays the minimum and maximum percentages of salary increase available to an employee, which is defined on the Salary page of the compensation cycle definition. If such information is not available for the employee in the system, the values will be displayed as zero for the employee in the chart.

Data displayed in this pivot grid pertains to the compensation cycle from which the pivot grid is generated and it is available only for salary plans. It is not available to variable compensation plans.

The initial view of the pivot grid shows the count of all salary increase proposals, broken down by rating.

When you click a segment of the pivot grid, you can select to:

- View the details of the segment in a grid format. For example, details of all salary increases initiated for the Exceeds Expectations rating.
- View further drill-down of the segment data using these dimensions in the chart format:
  - Job Code
  - Employee Name

For example, a bar chart showing all salary increases initiated for the Exceeds Expectations rating, broken down by job code.

## Variable Compensation by Performance Page

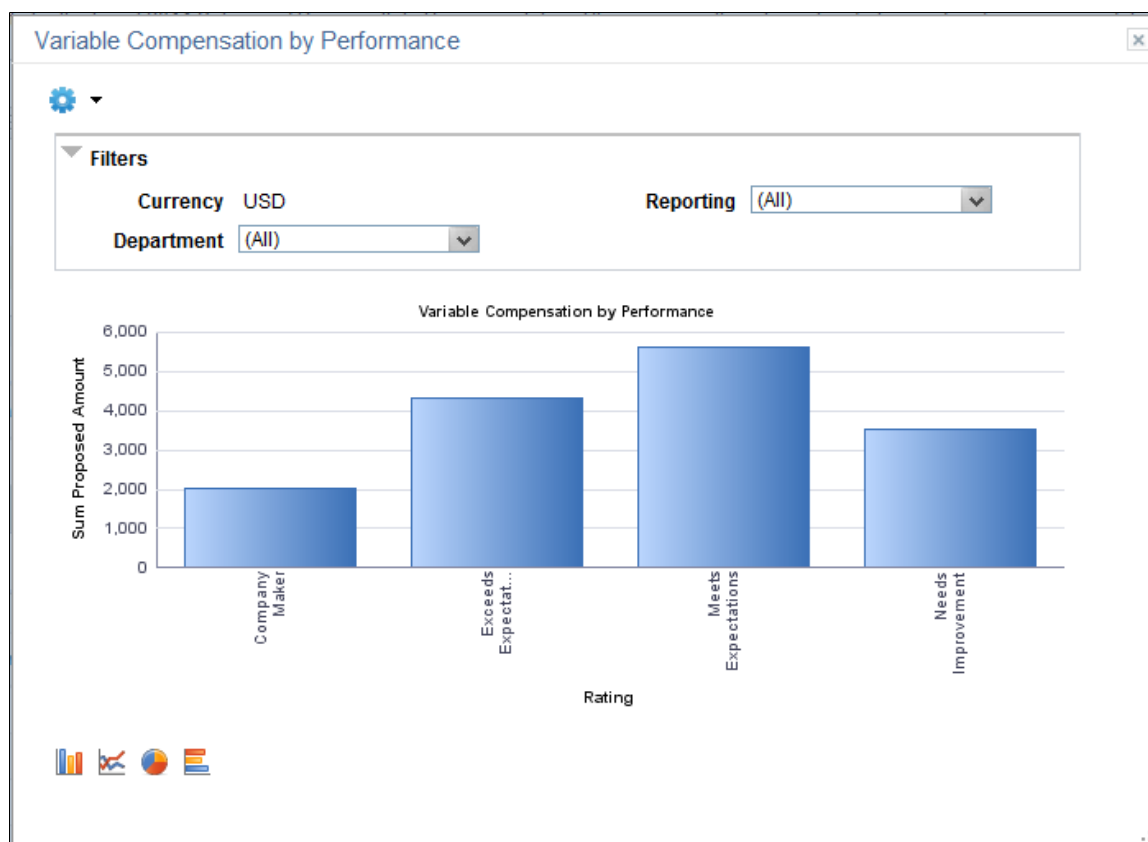
Use the Variable Compensation by Performance page (PTPG\_PGVIEWER) to view the Variable Compensation by Performance pivot grid.

## Navigation

Click the Analytics link of a cash-type variable compensation plan (like Bonus Plan) and then the Variable Compensation by Performance link on the Allocate Compensation page.

### Image: Variable Compensation by Performance pivot chart

This example illustrates the fields and controls on the Variable Compensation by Performance pivot chart.



## Information Displayed in the Variable Compensation by Performance Pivot Grid

The Variable Compensation by Performance pivot grid is similar to the Salary Increase by Performance pivot grid in purpose and functionality. The only differences are:

- The Variable Compensation by Performance pivot grid is built for variable compensation (non-salary) plans that are cash type plans.
- Proposed amount is shown as the Y-axis display, not proposed percentage increase as in the Salary Increase by Performance pivot grid.

---

**Important!** In order for performance data to be retrieved for use in this pivot grid, integration with PeopleSoft ePerformance is required.

---

The initial view of the pivot grid shows the summed proposal amounts of all cash-type variable compensation proposals, broken down by performance rating. When you click a segment of the chart, you can select to:

- View the details of the segment in a grid format. For example, details of all variable compensation proposals initiated for the Exceeds Expectations rating.
- View further drill-down of the segment data using these dimensions in the chart format:
  - Job Code
  - Employee Name

For example, a bar chart showing all variable compensation proposals initiated for the Exceeds Expectations rating, broken down by job code.

## Salary Analysis Page

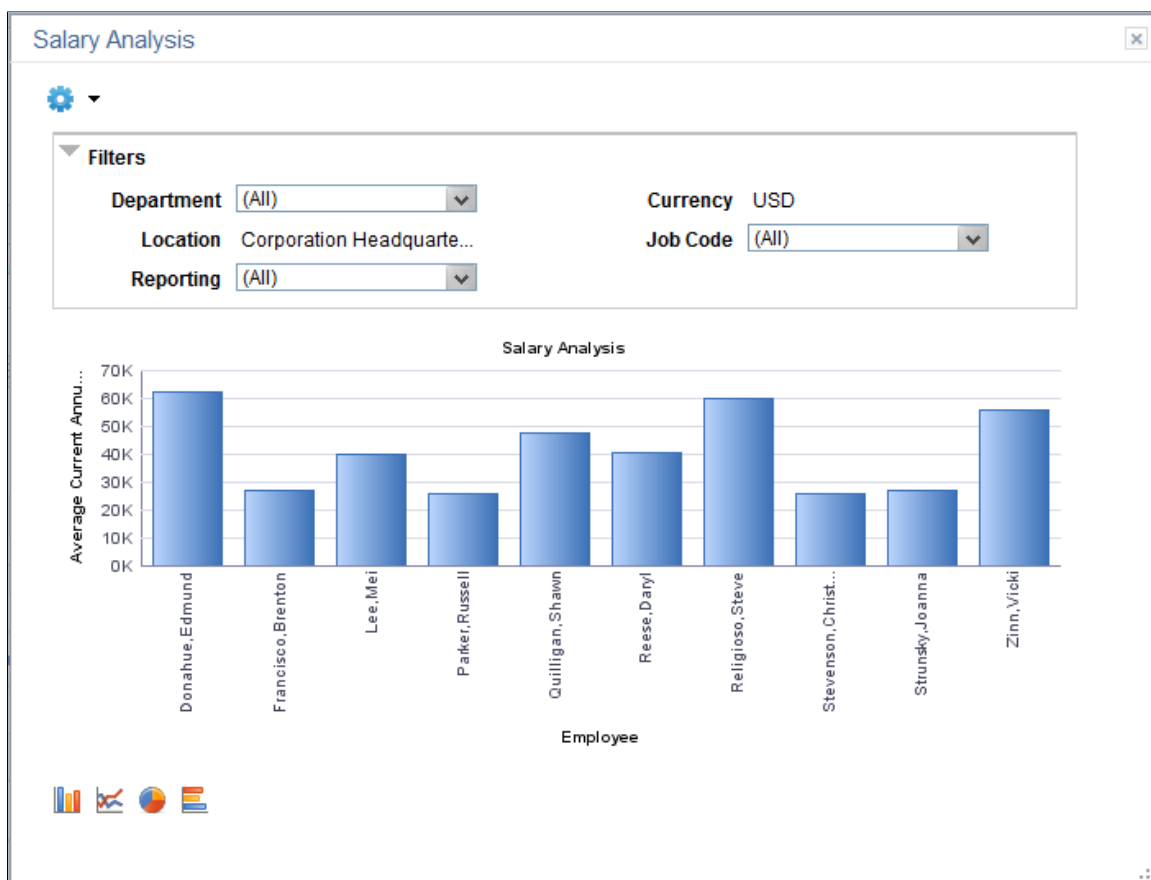
Use the Salary Analysis page (PTPG\_PGVIEWER) to view the Salary Analysis pivot grid.

### Navigation

Click the Compensation Analytics link and then the Salary Analysis link on the Allocate Compensation page.

### Image: Salary Analysis pivot chart

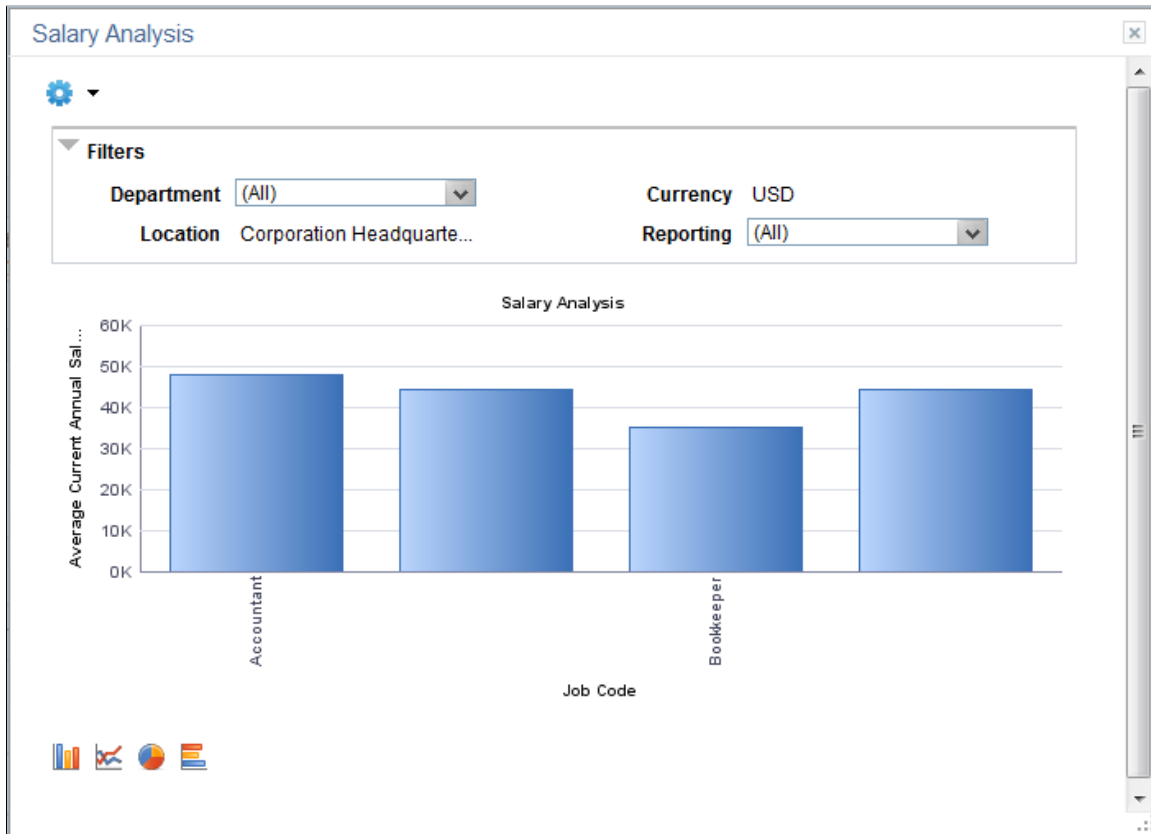
This example illustrates the fields and controls on the Salary Analysis pivot chart.



In addition to using filters, you can also change how data is displayed by changing the information represented in X-axis and Y-axis. To do so, select chart options from the Options Menu. For example, change the X-Axis from the default value to *Job Code* and click OK to refresh the display:

### Image: Salary Analysis pivot chart with Job Code as X-Axis

This example illustrates the fields and controls on the Salary Analysis pivot chart with Job Code as X-Axis.



### Information Displayed in the Salary Analysis Pivot Grid

Managers can use the Salary Analysis pivot grid to compare salary compensation for all their direct and indirect reports. When viewed in the grid format, this pivot grid displays the salary minimum, maximum, and midpoint of an employee, which is defined on the salary grade assigned to each employee. If such information is not available for the employee in the system, the values will be displayed as zero for the employee in the chart.

Data displayed in this pivot grid pertains to the compensation cycle from which the pivot grid is generated and it covers all salary plans within that cycle. Variable compensation plans are not included.

The initial view of the pivot grid shows the average current annual salaries of all direct and indirect reports of the manager, broken down by employee name. When you click a segment of the chart, you can select to view the details of the segment in a grid format, which is the salary information the selected employee.

## Compensation Distribution Page

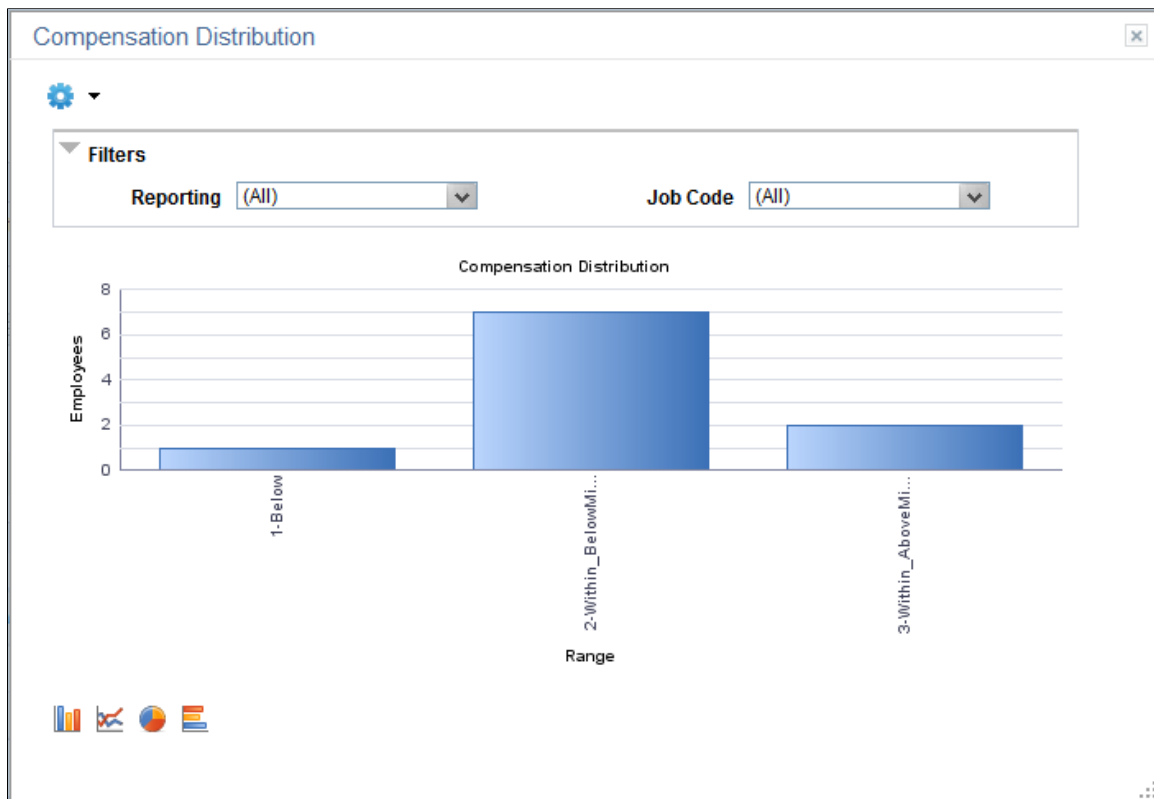
Use the Compensation Distribution page (PTPG\_PGVIEWER) to view the Compensation Distribution pivot grid.

### Navigation

Click the Compensation Analytics link and then the Compensation Distribution link on the Allocate Compensation page.

### Image: Compensation Distribution pivot chart

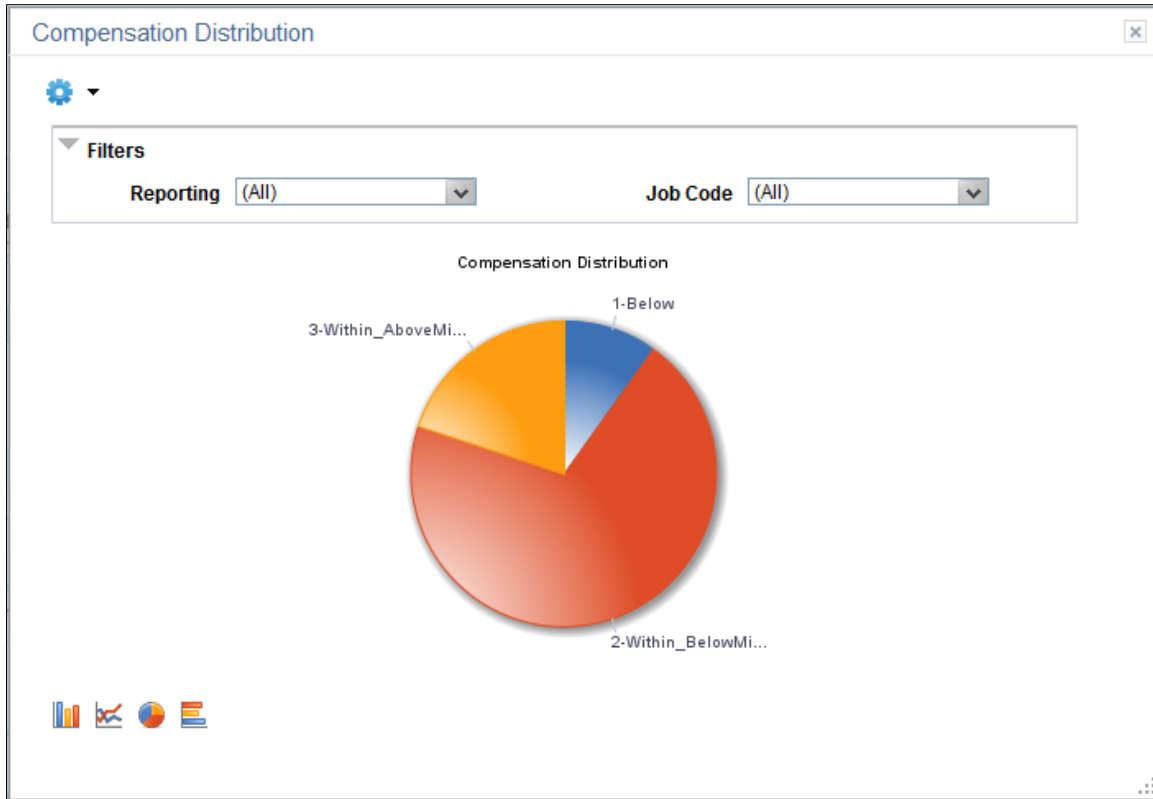
This example illustrates the fields and controls on the Compensation Distribution pivot chart.



You can click the Pie Chart icon to change the display format to pie chart:

**Image: Compensation Distribution pivot grid displayed as pie chart**

This example illustrates the fields and controls on the Compensation Distribution pivot grid displayed as pie chart.



**Information Displayed in the Compensation Distribution Pivot Grid**

From the Compensation Distribution pivot grid, managers can see how their employees are compensated in terms of salary pay, specifically, where they are in relation to their respective salary ranges.

Data displayed in this pivot grid pertains to the compensation cycle from which the pivot grid is generated and it covers all plans within that cycle.

The initial view of the pivot grid shows the employee count (direct and indirect reports of the manager) for each of these salary range categories:

- Below the salary range minimum
- Within the salary range, but below the salary midpoint
- Within the salary range and at or above the salary midpoint
- Above the salary range maximum

A salary range category is not visible if the corresponding count is zero.

When you click a segment of the chart, you can select to:

- View the details of the segment in a grid format. For example, details of employees in the within or above mid-point category.
- View further drilldown of the segment data using these dimensions in the chart format:
  - Group Status
  - Employee Name
  - Job Family

For example, a bar chart showing employee counts in the within or above mid-point category, broken down by job family code.

## Cycle Guideline Alert Page

Use the Cycle Guideline Alert page (PTPG\_PGVIEWER) to view the Cycle Guideline Alert pivot grid.

### Navigation

Click the Compensation Analytics link and then the Cycle Guideline Alert link on the Administer Cycle page.

### Image: Cycle Guideline Alert pivot chart

This example illustrates the fields and controls on the Cycle Guideline Alert pivot chart.

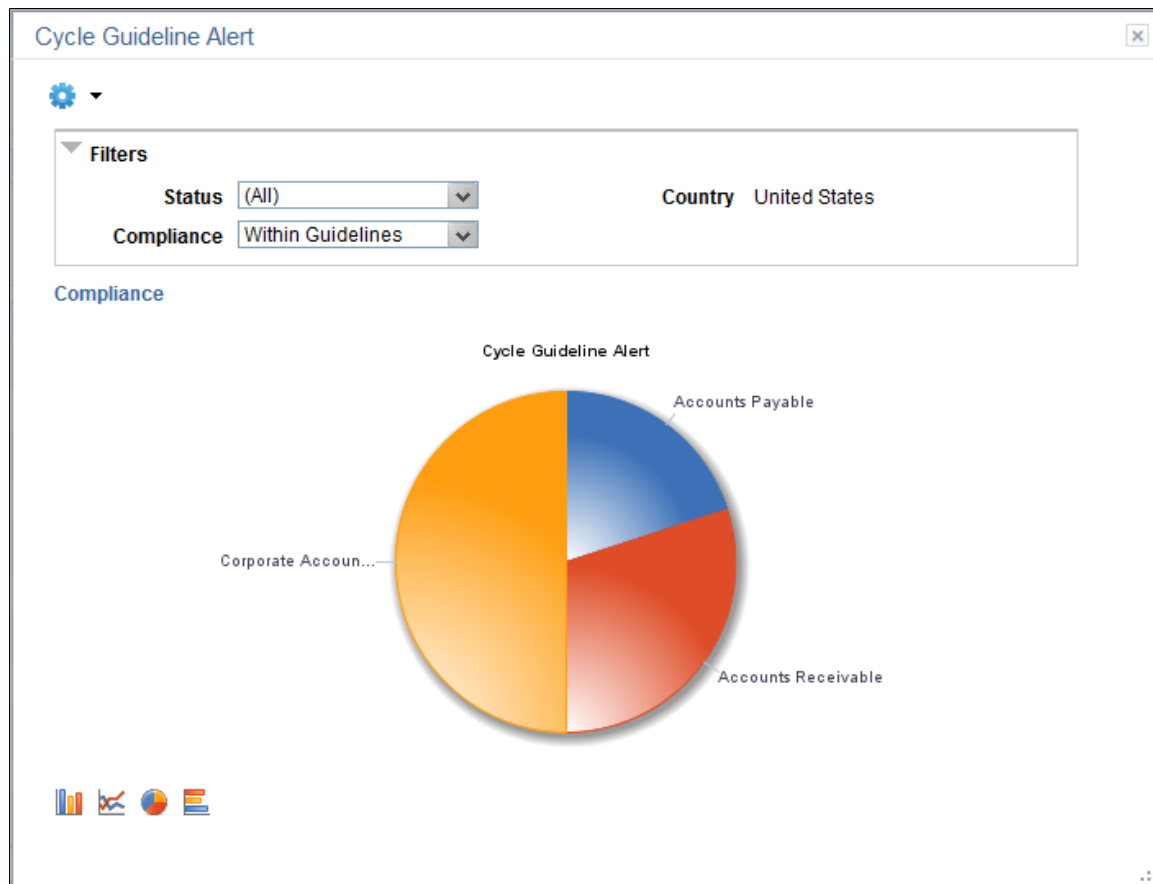




You can click a bar and select to drill down that piece of data further, for example, by department:

### Image: Cycle Guideline Alert pivot chart by Department

This example illustrates the fields and controls on the Cycle Guideline Alert pivot chart by Department.



**Note:** This pivot grid is not available to cycles that are in any status prior to *Opened*.

### Information Displayed in the Cycle Guideline Alert Pivot Grid

From the Cycle Guideline Alert pivot grid, administrators can see the counts of salary allocation proposals that fall within, as well as outside of the recommended guidelines respectively. Data for this pivot grid is based on all salary proposals that are associated with the compensation cycle from which this pivot grid is generated.

**Note:** If none of the plans for the cycle contains a maximum allowed salary percentage increase, the pivot grid is not applicable and therefore not displayed under the Compensation Analytics link.

The initial view of the pivot grid shows the salary proposal counts, broken down by guideline compliance (*Within Guidelines* or *Outside Guidelines*). *Within Guidelines* refers to any proposals where the proposed percentage increase is equal to or greater than the minimum salary percent increase and *either* one of the following two conditions apply:

- The proposed percentage increase is equal to or less than the maximum salary percent increase.

- The maximum salary percent increase is zero.

Any proposals that do not meet these conditions are considered *Outside Guidelines*.

The system uses these formulas to calculate the proposed percentage increase for the Cycle Guideline Alert pivot grid:

Proposed Percentage Increase = Proposed Amount / Total Annual Salary \* 100 (if proposed amount > 0)

Otherwise,

Proposed Percentage Increase = Calculated Amount / Total Annual Salary \* 100

When you click a segment of the chart, you can select to:

- View the details of the segment in a grid format, for example, details of all proposals that are within guidelines.
- View further drill-down of the segment data using these dimensions in the chart format:
  - Group Node
  - Department
  - Salary Plan
  - Location
  - Job Code
  - Employee Name

For example, a bar chart showing all proposals that are within guidelines, broken down by department.

## Cycle Tracking Page

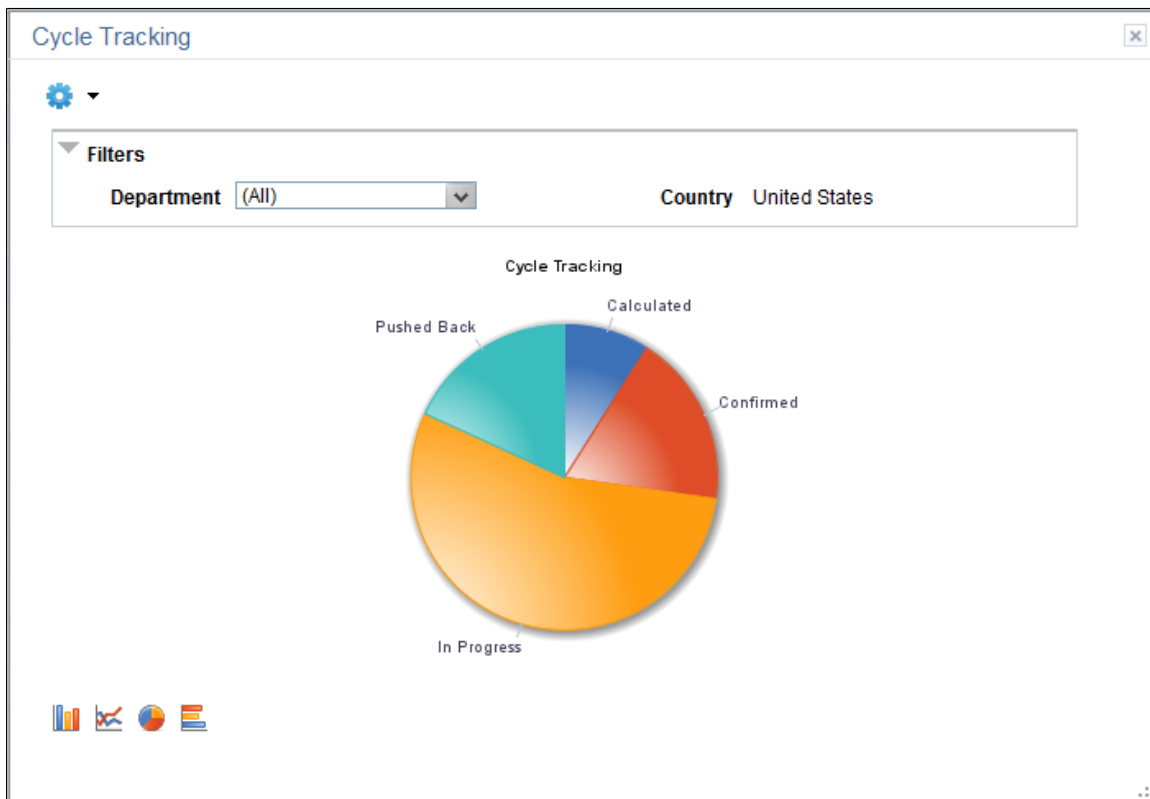
Use the Cycle Tracking page (PTPG\_PGVIEWER) to view the Cycle Tracking pivot grid.

## Navigation

Click the Compensation Analytics link and then the Cycle Tracking link on the Administer Cycle page.

### Image: Cycle Tracking pivot chart

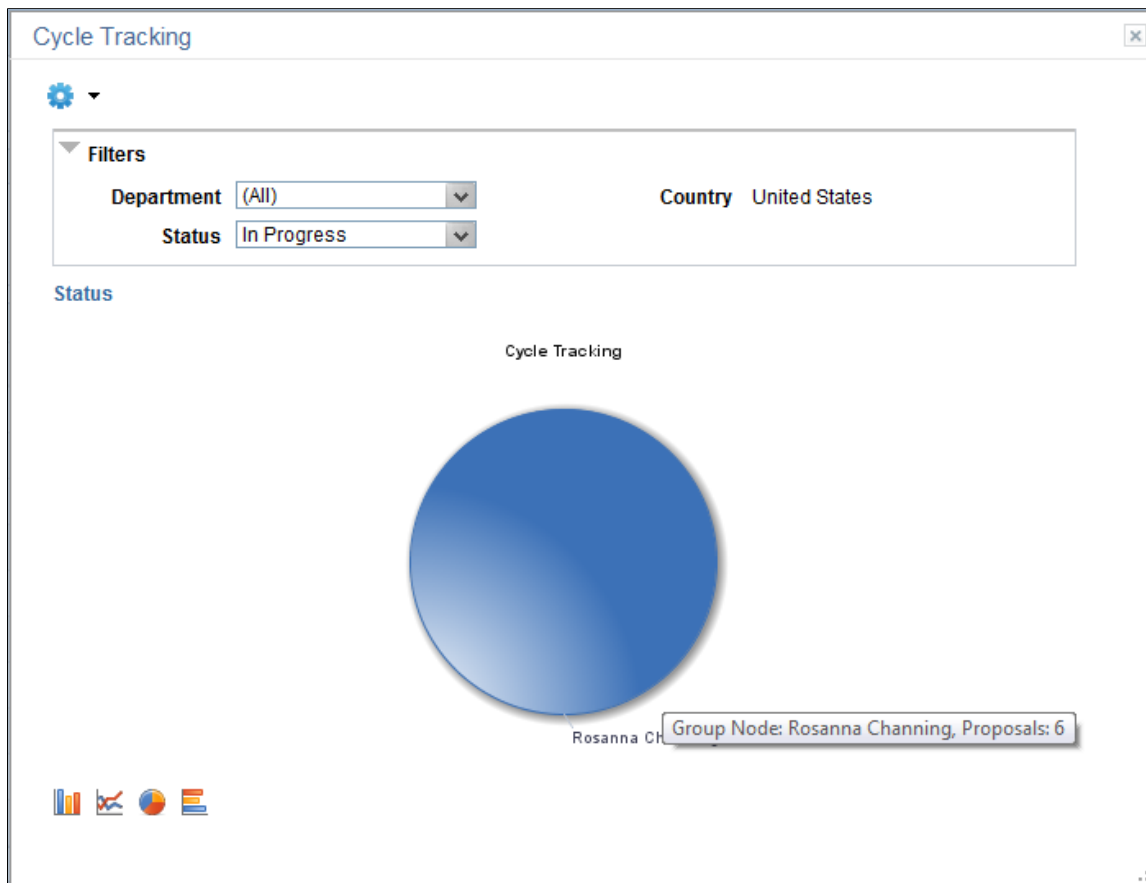
This example illustrates the fields and controls on the Cycle Tracking pivot chart.



You can click a bar and select to drill down that piece of data further, for example, by group node:

**Image: Cycle Tracking pivot chart showing data by group node**

This example illustrates the fields and controls on the Cycle Tracking pivot chart showing data by group node.



The Cycle Tracking pivot grid gives administrators a quick status view of all salary allocation proposals pertaining to the compensation cycle from which the pivot grid is generated. The initial view of the pivot grid shows the proposal counts, broken down by status (Calculated, In Progress, Submitted, Pushed Back, Confirm, Ready to Load, and so on).

---

**Note:** This pivot grid is not available to cycles that are in any status prior to *Opened*.

---

When you click a segment of the chart, you can select to:

- View the details of the segment in a grid format, for example, details of all proposals in the Calculated status.
- View further drill-down of the segment data using these dimensions in the chart format:
  - Group Node
  - Salary Plan
  - Location
  - Job Code

- Employee Name

For example, a bar chart showing all proposals that are in the Calculated status, broken down by job code.



## Chapter 9

# Reviewing Employee Compensation

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## Understanding Compensation History

Managers use the Compensation History transaction to review or verify an employee's compensation history. The Compensation History page contains:

- A grid that displays the entire list of compensation changes pertaining to the employee, which include base salary, variable cash, variable non-cash, and stock option type changes.

Items are displayed in chronological order, with the most recent displayed first. The manager can click the date link to access a modal page to view additional information about the change.

- Access to charts that display compensation data of the employee in a graphical format by compensation source and time period.

If the employee has multiple jobs under the same manager, the same number of rows appear for the employee in the grid.

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## Reviewing Employee Compensation

This section lists the pages that are used to review employee compensation.

### Pages Used to Review Employee Compensation

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Compensation History (Select Employee)	HR_DR_DIRECTREPORT	Manager Self Service, Compensation and Stock, View Compensation History, View Compensation History (Select Employee)	Select an employee for whom the compensation history is viewed.
Compensation History	HR_ECOMP_MG_HIST	Select an employee on the Compensation History (Select Employee) page.	Review or verify an employee's compensation history.
Compensation History Chart	HR_ECOM_CHART_SEC	Click the Compensation History Chart icon on the Compensation History page.	View the compensation data changes in a graphical format.
Award Details	HR_SS_MG_SALCG_SEC	Click a date in the Date of Change column on the Compensation History page.	View details of the corresponding compensation award (for example, base salary change or cash award).


## Compensation History Page

**Image: Compensation History page**

This example illustrates the fields and controls on the Compensation History page.

Compensation History

Rosanna Channing



Compensation History						View All	First	1-7 of 7	Last
Date of Change	Amount	Change Type	Source	Currency	Job Title				
05/01/2012	72,800.00	Pay Rate Change	Base Salary	USD	Senior Manager-Accounting				
07/01/2011	72,800.00	6,240.00 Pay Rate Change	Base Salary	USD	Senior Manager-Accounting				
02/11/2011	3,400.00	Discretionary Bonus	Variable Cash	USD	Senior Manager-Accounting				
07/01/2010	66,560.00	6,552.00 Pay Rate Change	Base Salary	USD	Senior Manager-Accounting				
02/15/2010	1,800.00	Discretionary Bonus	Variable Cash	USD	Senior Manager-Accounting				
02/15/2009	1,200.00	Discretionary Bonus	Variable Cash	USD	Senior Manager-Accounting				
08/29/1986	60,008.00	Hire	Base Salary	USD	Senior Manager-Accounting				

Issued Currency

Return to Select Employees



### Related Actions for <employee name>

Click to expand the list of related actions that are available to the employee. Related actions provide users quick access to major self service transactions from one page instead of through traditional menu navigations.



## Compensation History Chart

Click to access the Compensation History Chart page in a modal window, and view the compensation data changes in a graphical format.

**<date link>**

Click to view more information about the corresponding compensation change in a modal window.

### Issued Currency or Preferred Currency

Click to toggle between the currency in which the compensation was issued and the currency specified in the user profile. By default, the preferred currency is used in the grid and the charts.

If data shown in the grid includes multiple currencies, the most recently used one will be used in the chart display.

## Compensation History Chart Page

Use the Compensation History Chart page (HR\_ECOM\_CHART\_SEC) to .view the compensation data changes in a graphical format.

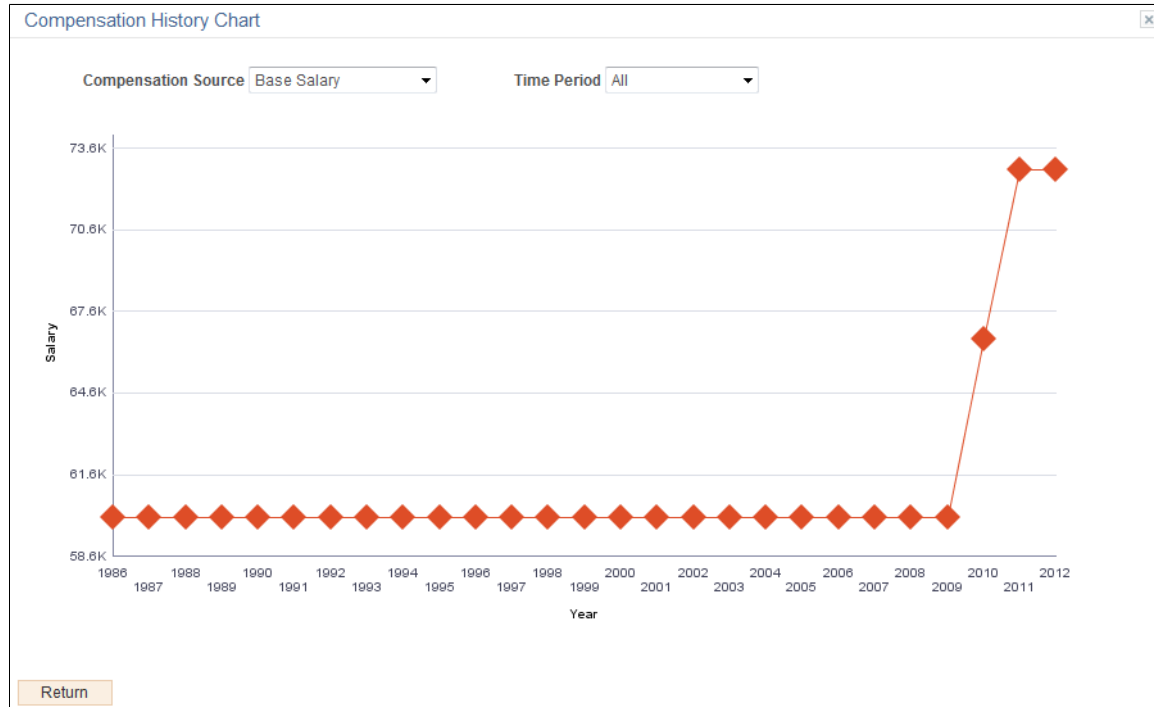


## Navigation

Click the Compensation History Chart icon on the Compensation History page.

### Image: Compensation History Chart page

This example illustrates the fields and controls on the Compensation History Chart page.



#### Compensation Source

Select the type of history data used to plot the chart. The system supports these sources:

- Base Salary (line chart)
- Variable Cash (bar chart)
- Stock Option (bar chart)
- Variable Non-Cash (bar chart)

If the employee doesn't have compensation changes a any particular source, the history chart for that source is not available for selection.

#### Time Period

Select the time period to filter compensation data to be displayed in the chart.

Values are *All*, *Last 15 Years*, *Last 10 Years*, and *Last 5 Years*.

#### Job

Select the job you like to view the compensation data of in the chart. This filter is only available in Employee Self Service to employees who have more than one job.

Data displayed on a chart is filtered by compensation source and time period in most cases. In Manager Self Service, a

manager who has a direct report with multiple jobs (under the same manager) sees multiple rows for that employee in the Compensation History grid.

## Award Details Page

Use the Award Details page (HR\_SS\_MG\_SALCG\_SEC) to view details of the corresponding compensation award (for example, base salary change or cash award).

### Navigation

Click a date in the Date of Change column on the Compensation History page.

### Image: Award Details page

This example illustrates the fields and controls on the Award Details page.



The screenshot shows a web application window titled "Award Details" with a close button in the top right corner. Inside the window, there is a section titled "Salary Change Details" with a horizontal line underneath. Below this line, the following information is displayed:

Date of Change	07/01/2011	
Annual Salary	72,800.00	USD
Previous Annual Salary	66,560.00	USD
Change Amount	6,240.00	USD
Change Percent	9.375	

At the bottom left of the window, there is a button labeled "Return".

This page shows additional information about the selected row. Fields on this page change based on the source of the compensation change.

# Changing Employee Salaries When No Allocated Budget Exists

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## Understanding the Change Employee Salary Process

eCompensation Manager Desktop provides three self service transactions that improve the efficiency for changing employee salaries:

- Request Ad Hoc Salary Change.
- Approve Ad Hoc Salary Change.
- View Ad Hoc Salary Change Status.

To complete the salary change process, a manager:

1. Accesses the Request Ad Hoc Salary Change page.

The system displays a list of the manager's direct reports.

2. Selects one or more employees.
3. Enters information about the salary change.
4. Submits the request.

The system either updates the job compensation records or sends notifications to the approving managers.

The approving manager:

1. Accesses the Approve Ad Hoc Salary Change page.
2. Approves or denies the salary change for one or more employees.

The details of the salary change cannot be altered. However, the approving manager can enter a comment regarding the salary change.

---

**Note:** Using the View Ad Hoc Salary Change Status page, managers can check on the status of the request. If an administrator needs to process the data, they can access the Workflow Inquiry page.

---

## Prerequisites

Before you can begin the Request Ad Hoc Salary Change process you must:

1. Activate Workflow.

2. Set up group build if Group ID is going to be used as the access type for managers requesting salary changes for their direct reports.
3. Set up the access type for HR\_MGR\_SALCHANGE on the Direct Reports Setup page.

### Related Links

"Understanding Group Build (*PeopleSoft HCM 9.2: Application Fundamentals*)"

"Configuring Self-Service Transactions (*PeopleSoft HCM 9.2: Application Fundamentals*)"

---

## Changing Employee Salaries When No Allocated Budget Exists

This section discusses how to:

- Select employees for salary changes.
- Request salary changes for employees.
- Select transactions to approve.
- Approve ad hoc salary changes.
- View salary change transaction details and approval statuses.
- Process salary change requests submitted by managers.

### Pages Used to Change Employee Salary When No Allocated Budget Exists

Page Name	Definition Name	Navigation	Usage
Request Ad Hoc Salary Change page (Select Employee)	HR_DR_DIRECTREPORT	Manager Self Service, Compensation and Stock, Request Ad Hoc Salary Change, Request Ad Hoc Salary Change (Select Employee)	Select employees for whom you want to make salary changes.
Request Ad Hoc Salary Change	HR_SALCHANGE_MGR	Select one or more employees on the Request Ad Hoc Salary Change page (Select Employee) and click the Continue button.	Enter new salary information for employees.
Select Transaction to Approve	SS_LIST	Manager Self Service, Compensation and Stock, Approve Ad Hoc Salary Change, Select Transaction to Approve	Select the employee for whom you want to approve a salary change.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Approve Ad Hoc Salary Change	HR_SALCHANGE_MGR	From the Select Transaction to Approve page, click the link associated with the employee whose salary change you want to approve.	Approve or deny each employee's salary change request and enter any relevant comments.
View Ad Hoc Salary Change Status	HR_SALCHANGE_STL	Manager Self Service, Compensation and Stock, View Ad Hoc Salary Chg Status, View Ad Hoc Salary Change Status	View the status of a salary change request.
Administer Request	HR_SALCHANGE_ADM	Workforce Administration, Self Service Transactions, Ad Hoc Salary Change Requests, Administer Request	Review and update salary change request statuses.

## Request Ad Hoc Salary Change Page (Select Employee)

Use the Request Ad Hoc Salary Change page (Select Employee) (HR\_DR\_DIRECTREPORT) to select employees for whom you want to make salary changes.

### Navigation

Manager Self Service, Compensation and Stock, Request Ad Hoc Salary Change, Request Ad Hoc Salary Change (Select Employee)

### Image: Request Ad Hoc Salary Change page (Select Employee)

This example illustrates the fields and controls on the Request Ad Hoc Salary Change page (Select Employee).

### Request Ad Hoc Salary Change

**Employee Selection Criteria**

Select the employee for whom you'd like to request ad hoc salary change. You can initiate transactions only for employees who reported to you as of the date you entered on this page.

As Of Date

**Betty Locherty's employees**

Select	Name	Empl ID	Job	HR Status	Job Title	Department
<input type="checkbox"/>	<input type="button" value="⊕"/> Cynthia Adams	KU0101	0	Active	Corporate Controller	Corporate Accounting
<input type="checkbox"/>	Diane Palmer	KOMTX005	0	Active	Assistant-Administrative	Corporate Finance
<input type="checkbox"/>	<input type="button" value="⊕"/> Jill Chancellor	KUL702	0	Active	Manager-Payroll	Payroll
<input type="checkbox"/>	<input type="button" value="⊕"/> John Breamar	HUX001	0	Active	Director	Public Affairs
<input type="checkbox"/>	Mei Lee	HXCMP0076	0	Active	Analyst-Financial	Finance and Administration
<input type="checkbox"/>	<input type="button" value="⊕"/> Netty Owyang	KU0055	0	Active	Manager-Accounting	International Accounting
<input type="checkbox"/>	<input type="button" value="⊕"/> Rosanna Channing	KU0046	0	Active	Senior Manager-Accounting	Corporate Accounting
<input type="checkbox"/>	<input type="button" value="⊕"/> Steve Parsons	R-RDSP14	0	Active	Assistant Controller	Corporate Headquarters
<input type="checkbox"/>	Susan Hoinck	KU0119	0	Active	Analyst-Financial Sr	Corporate Finance
<input type="checkbox"/>	<input type="button" value="⊕"/> Tina Palisco	KU0071	0	Active	Manager-Accounting	Corporate Consolidations

Select All   Deselect All

Select the check boxes associated with the employees whose salary you want to change. To select someone who belongs to the organization of your direct report, click the Expand button of that direct report to show his or her organization. After employees are selected, click the Continue button.

## Request Ad Hoc Salary Change Page

Use the Request Ad Hoc Salary Change page (HR\_SALCHANGE\_MGR) to enter new salary information for employees.

### Navigation

Select one or more employees on the Request Ad Hoc Salary Change page (Select Employee) and click the Continue button.

### Image: Request Ad Hoc Salary Change page

This example illustrates the fields and controls on the Request Ad Hoc Salary Change page.

**Request Ad Hoc Salary Change**  
Rosanna Channing

**Instructions**  
The employee you selected is displayed below. Enter the desired salary change information for the employee and select Calculate New Total, then submit your salary change by selecting Submit.

\*Salary Change Date: 10/26/2012

Pay Component	Current Amount	Change Percent (ex. 10.850%)	Change Amount	New Amount	Type	Frequency
Default NA Hourly	35	0.000	0.00	35 USD	Hourly Rate	Hourly

Calculate New Total

\$58,916.00 Minimum ————— \$73,645.00 Midpoint ————— \$88,374.00 Maximum

\$72,800.00 - Comp-Ratio - 0.99

	New Information	Current Information
Monthly Salary	\$6,066.67 USD	\$6,066.67 USD
Annual Rate	\$72,800.00 USD	\$72,800.00 USD
Comment		

Submit

[Return to Select Employees](#)

### [employee name]

Place the cursor over the employee name to view basic job and salary information of the employee, such as job title, full time or part time, number of work hours, salary plan, grade, and step.



### Related Actions for <employee name>

Click to expand the list of related actions that are available to the employee. Related actions provide users quick access to major self service transactions from one page instead of through traditional menu navigations.

### Previous and Next

Click to access the salary change request of another employee preceding or following the current one. These buttons appear if more than one employee are selected for the salary change request process.

## Compensation Details

This section displays base pay components for which the manager is allowed to enter salary changes.

<b>Change Percent</b>	If you want to change the salary amount by a specific percentage amount, enter that amount.
<b>Change Amount</b>	If you want to change the salary amount by a flat amount, enter that amount.
<b>New Amount</b>	If you want to just enter the new salary amount, enter that amount.
<b>Calculate New Total</b>	Click to calculate the new total and new annual rate amounts after salary change is made.

## Slider Widget

The slider provides a graphical representation of the employee's salary in relation to the salary range of the employee's salary grade. It shows:

- The minimum, mid-point, and maximum amounts of the salary range for the employee's salary grade.
- The current (or the calculated amount after change is made) of salary of the employee, together with the compensation ratio.

## New Information and Current Information

These sections provide a quick view of the employee's current salary (employee's compensation frequency and annually) and the new numbers after the salary change takes effect.

<b>Submit or Submit All</b>	Click to submit the salary change request for selected employees.  A confirmation message appears when the request has been submitted successfully.
<b>Return to Select Employees</b>	Click to start the process over again by returning to the previous page and selecting other employees.

## Select Transaction to Approve Page

Use the Select Transaction to Approve page (SS\_LIST) to select the employee for whom you want to approve a salary change.

## Navigation

Manager Self Service, Compensation and Stock, Approve Ad Hoc Salary Change, Select Transaction to Approve

### Image: Select Transaction to Approve page

This example illustrates the fields and controls on the Select Transaction to Approve page.

### Select Transaction to Approve

The hyperlinks below indicate groups of employees which require your participation in an approval process. Select a hyperlink to see details about what needs to be approved for each employee contained in the group

[Ad Hoc Salary Change 7](#)

**Submitted By** Rosanna Channing      **Submitted Date** 09/17/2012

Data						Personalize   Find       1 of 1
Empl ID	Name	Job Title	Last Process Action	Status Indicator	Last Processed By	
KU0044	Daryl Reese	Fin Anlyst	Submit	In Approval Process	Rosanna Channing	

**Go To**      [Return To Manager Self Service](#)  
[Return to Compensation and Stock](#)

Click the link above the employee's name. The system displays the Approve Ad Hoc Salary Change page.

## Approve Ad Hoc Salary Change Page

Use the Approve Ad Hoc Salary Change page (HR\_SALCHANGE\_MGR) to approve or deny each employee's salary change request and enter any relevant comments.



## Navigation

Click the link of the ad hoc salary change you want to approve on the Select Transaction to Approve page.

### Image: Approve Ad Hoc Salary Change page (1 of 2)

This example illustrates the fields and controls on the Approve Ad Hoc Salary Change page (1 of 2).

### Approve Ad Hoc Salary Change

**Daryl Reese**

[Instructions](#)

Salary Change Date 09/17/2012

Compensation Details						
Pay Component	Current Amount	Change Percent (ex. 10.850%)	Change Amount	New Amount	Type	Frequency
Default NA Hourly	19.5	2.564	0.50	20 USD	Hourly Rate	Hourly

\$41,600.00 - Comp-Ratio - 1.00

**\$33,372.00**  
Minimum

**\$41,715.00**  
Midpoint

**\$50,058.00**  
Maximum

**New Information**

Monthly Salary \$3,466.67 USD

Annual Rate \$41,600.00 USD

**Current Information**

Monthly Salary \$3,380.00 USD

Annual Rate \$40,560.00 USD

Comment

[Print](#) [Edit](#)

**Approve / Deny**

**Image: Approve Ad Hoc Salary Change page (2 of 2)**

This example illustrates the fields and controls on the Approve Ad Hoc Salary Change page (2 of 2).

Process Detail			
Name	Role Name	Process Action	Process Action Date
Rosanna Channing	Originator	Submit	09/17/2012
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
	Manager		
	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		

Comments

Submit

[Return to Approval/Status List](#)

The top part of the page displays the submitted salary request that is pending approval.

Select either *Approve* or *Deny* and then click Submit. In addition, you can add a comment in the Comment field before you approve or deny the salary change request.

**View Ad Hoc Salary Change Status Page**

Use the View Ad Hoc Salary Change Status page (HR\_SALCHANGE\_STL) to view the status of a salary change request.

## Navigation

Manager Self Service, Compensation and Stock, View Ad Hoc Salary Chg Status, View Ad Hoc Salary Change Status

### Image: View Ad Hoc Salary Change Status page



This example illustrates the fields and controls on the View Ad Hoc Salary Change Status page.

### View Ad Hoc Salary Change Status

The hyperlinks below indicate groups for which you are a participant in the approval process. Select a hyperlink to see details about the status of each transaction contained in the group



[Ad Hoc Salary Change 2](#)

Submitted By Rosanna Channing Submitted Date 09/14/2012

Data						Personalize   Find     1 of 1
Empl ID	Name	Job Title	Last Process Action	Status Indicator	Last Processed By	
KU0059	Vicki Zinn	Accountant	Deny	Denied	Betty Locherty	



[Ad Hoc Salary Change 3](#)

Submitted By Rosanna Channing Submitted Date 09/14/2012

Data						Personalize   Find     1 of 1
Empl ID	Name	Job Title	Last Process Action	Status Indicator	Last Processed By	
KU0044	Daryl Reese	Fin Anlyst	Deny	Denied	Betty Locherty	

[Ad Hoc Salary Change 7](#)

Submitted By Rosanna Channing Submitted Date 09/17/2012

Data						Personalize   Find     1 of 1
Empl ID	Name	Job Title	Last Process Action	Status Indicator	Last Processed By	
KU0044	Daryl Reese	Fin Anlyst	Approve	Administrator Action Required	Betty Locherty	

Go To [Return To Manager Self Service](#)  
[Return to Compensation and Stock](#)

To view more details, click the link above the employee's name. The system displays details of the corresponding salary change request on the View Status of Request page.

## Administer Request Page

Use the Administer Request page (HR\_SALCHANGE\_ADM) to review and update salary change request statuses.

## Navigation

Workforce Administration, Self Service Transactions, Ad Hoc Salary Change Requests, Administer Request

### Image: Administer Request page (1 of 3)

This example illustrates the fields and controls on the Administer Request page (1 of 3).

**Administer Request**

Per request, approve and update, approve only, or deny the proposed data. You may also enter optional comments about your processing choice per request. When you are finished, select Save button at the bottom of the page.

Salary Change Date 09/17/2012

**Daryl Reese**

**Compensation Details**

Pay Component	Current Amount	Change Percent (ex. 10.850%)	Change Amount	New Amount	Type	Frequency
Default NA Hourly	19.5	2.564	0.50	20 USD	Hourly Rate	Hourly

\$41,600.00 - Comp-Ratio - 1.00

\$33,372.00 Minimum      \$41,715.00 Midpoint      \$50,058.00 Maximum

**New Information**      **Current Information**

Monthly Salary	\$3,466.67 USD	\$3,380.00 USD
Annual Rate	\$41,600.00 USD	\$40,560.00 USD
Comment	<input type="text"/>	

### Image: Administer Request page (2 of 3)

This example illustrates the fields and controls on the Administer Request page (2 of 3).

**Process Detail**

Name	Role Name	Process Action	Process Action Date
Rosanna Channing	Originator	Submit	09/17/2012
Betty Locherty	Manager	Approve	09/17/2012
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
	Manager		
	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		
Betty Locherty	Manager		

**Comments**

**Image: Administer Request page (3 of 3)**

This example illustrates the fields and controls on the Administer Request page (3 of 3).

The screenshot shows the 'Administer Request page (3 of 3)'. At the top, there is a section titled 'Administrator Actions' with a status indicator 'Status Administrator Action Required'. Below this is a 'Self Service Admin Choices' section containing three radio button options:

- ☐ Select this option to approve the transaction and automatically update the database.
- ☐ Select this option to approve the transaction. You will be required to manually update the database.
- ☐ Select this option to cancel the transaction.

Below the radio buttons is a link 'Go To Job Data'. At the bottom of the form is a 'Save' button. Below the 'Save' button is a 'Go To' section with two links: 'Manager Home' and 'Salary and Compensation Home'.

**Self Service Admin Choices**

This section appears when it is the administrator's turn to take action (status is *Administrator Action Required*).

Select one of the radio buttons in the Self Service Admin Choices group box and then click Save. Depending upon your choice, the system:

- Approves the transaction and updates the database.
- Approves the transaction and requires you to manually update the database.
- Cancels the transaction.

The system changes the transaction status to *Success* or *Denied* based on the selection.

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## Handling Errors or Warnings

To display information about salary change requests, access the Workflow Inquiry page (Workforce Administration, Self Service Transactions, Workflow Inquiry). Enter either an employee ID or select a transaction name. If you select a transaction name, select *Ad Hoc Salary Change*. This page also provides an audit trail of who made the update to the database.

The Workflow Inquiry page enables administrators to review all transactions that:

- Successfully updated the database.
- Require further processing.

**Related Links**

"Reviewing Transactions (*PeopleSoft HCM 9.2: Application Fundamentals*)"



# Changing Budgeted Salaries for Employees

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## Understanding Budgeted Salary Changes

eCompensation Manager Desktop enables managers to change the salaries of their direct reports online. The process for changing a budgeted salary is:

1. The HR department must allocate and approve a salary increase budget for the group.
  2. The manager may review the employee's compensation history.
  3. If a salary change is required, the manager can enter the request and submit the request for approval.
  4. If approval is required, an approver can accept or reject the request.
  5. The manager can review the status of the request.
- 

## Prerequisites

Before managers can enter salary change requests, you must:

1. Activate workflow.
2. Set up budgeted salary plans.

### Related Links

"Configuring Self-Service Transactions (*PeopleSoft HCM 9.2: Application Fundamentals*)"

"Understanding the Base Compensation Budgeting and Planning Business Process (*PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting*)"

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## Entering Budgeted Salary Change Requests

Managers use the Request Budgeted Salary Change transaction to request or perform a merit increase for their direct reports. The manager selects an employee or a group and enters an increase for selected salary components. For groups with allocated budgets, the manager can adjust the increases for individuals in the group and compare the results with the budget. When the changes are complete, the manager submits the requests for approval. The submitted requests are routed for approval.

This section lists the pages used to request budgeted salary changes.

## Pages Used to Request Budgeted Salary Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Request Budgeted Salary Change	HR_SALCHGRP_LAUNCH	Manager Self Service, Compensation and Stock, Request Budgeted Salary Change, Request Budgeted Salary Change	Initiate a salary change request by selecting a group ID.
Request Salary Change for Group with Allocated Budget	HR_SALCHBGT_BUDGET	Select a Group ID link on the Request Budgeted Salary Change page.	Select a group to edit.
Change Employee's Salary	HR_SALCHBGT_SALPL	Click the Edit button associated with the employee whose salary you want to change on the Request Salary Change for Group With Allocated Budget page.	View component salary details and modify the proposed salary increase for an individual employee, then click Continue.
Change Salary Component	HR_SALCHBGT_SP_MC	Click the Edit button associated with the salary component that you want to change on the Change Employee's Salary page.	Modify the proposed salary change amount for an individual component in the employee's compensation package, then click Continue.
Submit Confirmation	HR_SALCHBGT_CONFRM	Click the Submit for Approval button on the Request Salary Change for Group with Allocated Budget page.	Verify that the salary change request has been submitted.

## Approving Budgeted Salary Changes

After the manager completes the salary change request, it is routed for approval. The levels of approval and approvers are set up in the approval setup tables and are displayed on the Approval page. Only the next approver on the list has access to the page. After final approval is granted, an email notification is sent to the manager and a worklist or email is sent to HR as notification that the salary changes are approved and can be loaded to the employees' job data.

This section lists the pages used to approve budgeted salary changes.

## Pages Used to Approve Budgeted Salary Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Approve Budgeted Salary Change	HR_SALCHGRP_APPR_L	Manager Self Service, Compensation and Stock, Approve Budgeted Salary Change, Approve Budgeted Salary Change	Initiate a salary change approval by selecting a group ID.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Approve Salary Change for Group with Allocated Budget	HR_SALCHBGT_BGT_AP	Click the link associated with the group ID for which you want to approve or deny salary changes on the Approve Group Salary Change page.	Approve or deny the requested salary changes.

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## Viewing the Statuses of Salary Changes

Managers use this transaction to view the status of salary change requests submitted in the Change Employee's Salary Change Request transaction. This page is identical to the Approval transaction, except that the Approve and Deny buttons do not appear.

This section lists the pages used to view salary change statuses.

### Pages Used to View Salary Change Statuses

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
View Budgeted Sal Chg Status	HR_SALCHGRP_VW_L	Manager Self Service, Compensation and Stock, View Budgeted Sal Chg Status, View Budgeted Sal Chg Status	View the status of a group salary change request by selecting the Group ID.
View Approval Status of Salary Change for Group with Allocated Budget	HR_SALCHBGT_BGT_VW	Select the ID of the group whose salary change status you want to view on the View Budgeted Sal Chg Status page.	View the status of salary change requests for the selected group.

