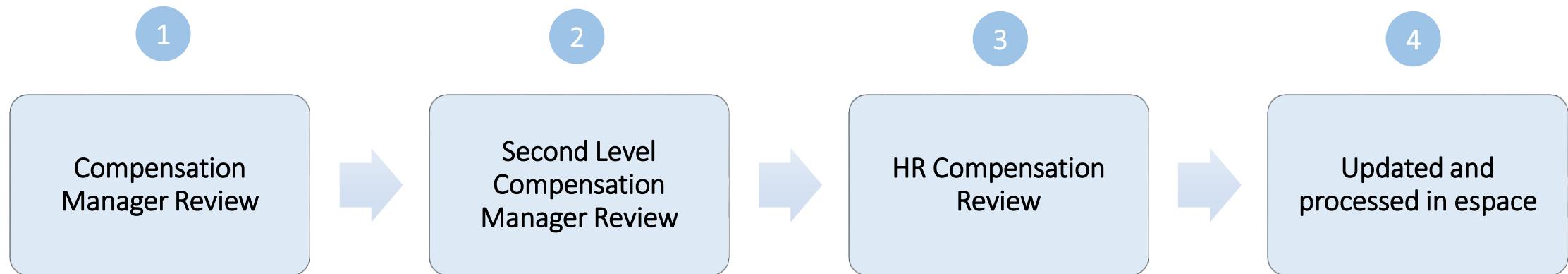


Quick Start Guide

This guide will get you started with managing employee compensation in **espace***.

1. Workflow

Below is the workflow for the annual Compensation Management Process.

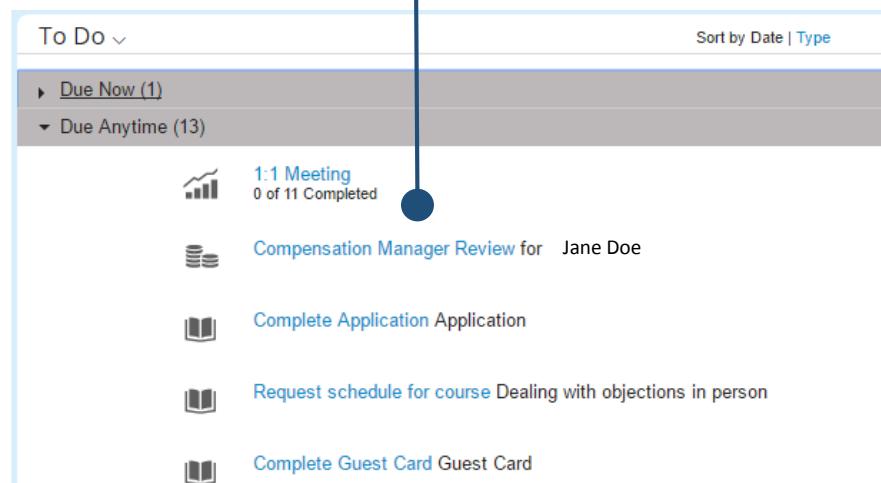


2. How to get Started

You can access the **Compensation Management Form** in two ways: (1) Select the form in the To Do tile or (2) Go to the Compensation page.

To Do tile

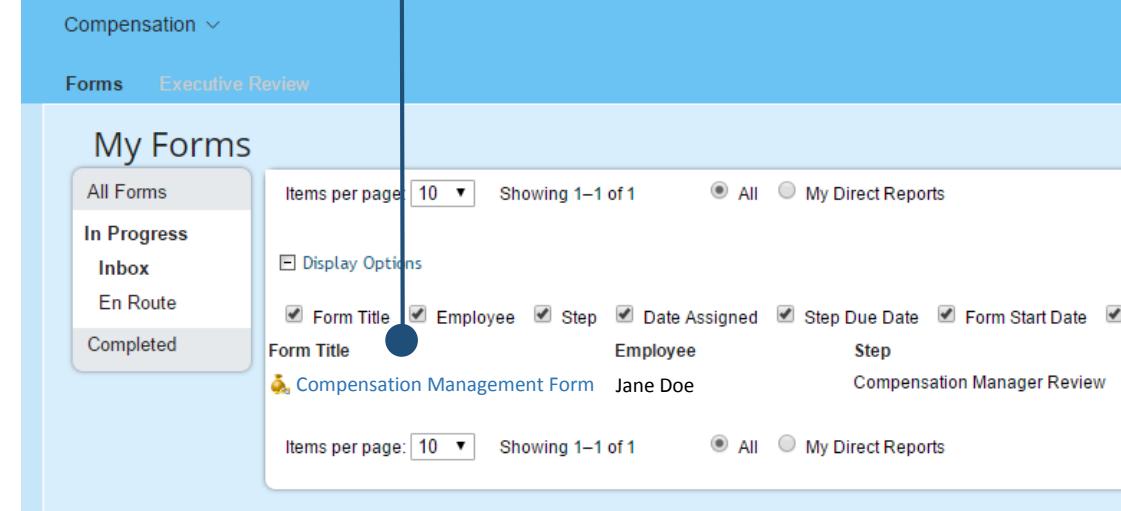
In the Home page, you will see a new task in your To Do tile. Click **Compensation Manager Review** to access the Compensation Management Form.



Compensation page

To access the Compensation Management Form in the Compensation page:

1. In the Home page, click Home > Compensation
2. Select the form in the Form Title column.



3. The Compensation Management Form

This is the main page where you can view your employees' compensation information.

Name

You can view the employee name in this column. Click  to view the employee profile. Click the employee name to view their Compensation Profile.

Manager Last Name

You can view the employee's manager in this column. Click  to view the manager's profile.

Review Rating

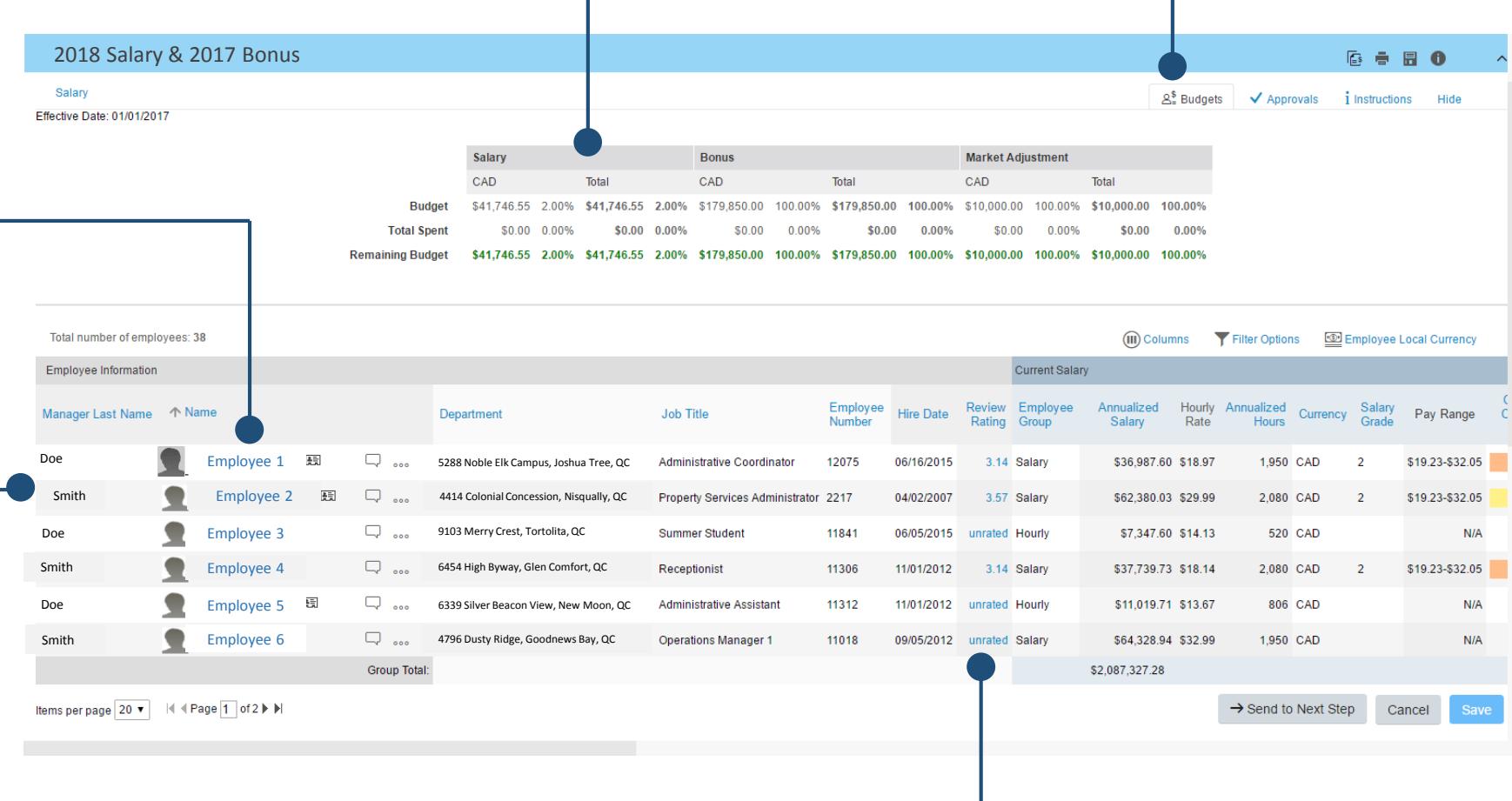
You can view the employee rating in this column. Click the rating to view their Performance assessment form.

Budget

The **Total Spent** and **Remaining Budget** columns are adjusted automatically each time you enter a Merit, Market Rate Adjustment, or Bonus amount.

Budget Tab

Click the **Budgets** tab to view the current budget for salaries and bonuses.



The screenshot shows the '2018 Salary & 2017 Bonus' page. At the top, there are tabs for 'Salary' (selected), 'Budgets' (highlighted in blue), 'Approvals', 'Instructions', and 'Hide'. The 'Budget' section displays a grid with columns for Salary, Bonus, and Market Adjustment, broken down by CAD and Total. It includes rows for 'Budget', 'Total Spent', and 'Remaining Budget'. Below this is a large table titled 'Employee Information' with columns for Manager Last Name, Name, Department, Job Title, Employee Number, Hire Date, Review Rating, Employee Group, Annualized Salary, Hourly Rate, Annualized Hours, Currency, Salary Grade, and Pay Range. The table lists six employees (Employee 1 to Employee 6) with various details like address, job title, and salary. A 'Group Total' row at the bottom shows a total salary of \$2,087,327.28. Navigation controls at the bottom include 'Items per page' (20), 'Page 1 of 2', 'Send to Next Step', 'Cancel', and 'Save'.

2018 Salary & 2017 Bonus												
Salary												
Effective Date: 01/01/2017												
Budget												
Salary												
Budget		CAD	Total	CAD	Total	CAD	Total	CAD	Total	CAD	Total	CAD
Total Spent		\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00	0.00%	\$0.00
Remaining Budget		\$41,746.55	2.00%	\$41,746.55	2.00%	\$179,850.00	100.00%	\$179,850.00	100.00%	\$10,000.00	100.00%	\$10,000.00
Market Adjustment												
Employee Information												
Manager Last Name				Name		Department		Job Title		Employee Number	Hire Date	Review Rating
Doe		Employee 1			...	5288 Noble Elk Campus, Joshua Tree, QC	Administrative Coordinator	12075	06/16/2015	3.14	Salary	\$36,987.60
Smith		Employee 2			...	4414 Colonial Concession, Nisqually, QC	Property Services Administrator	2217	04/02/2007	3.57	Salary	\$62,380.03
Doe		Employee 3			...	9103 Merry Crest, Tortolita, QC	Summer Student	11841	06/05/2015	unrated	Hourly	\$7,347.60
Smith		Employee 4			...	6454 High Byway, Glen Comfort, QC	Receptionist	11306	11/01/2012	3.14	Salary	\$37,739.73
Doe		Employee 5			...	6339 Silver Beacon View, New Moon, QC	Administrative Assistant	11312	11/01/2012	unrated	Hourly	\$11,019.71
Smith		Employee 6			...	4796 Dusty Ridge, Goodnews Bay, QC	Operations Manager 1	11018	09/05/2012	unrated	Salary	\$64,328.94
Group Total:												
\$2,087,327.28												
Items per page				< Page		1	of 2	>		Send to Next Step		
										Cancel		
										Save		

4. The Compensation Profile

In the Compensation Profile, you will make adjustments to salary amounts.

a. How to access the Compensation Profile

In the **Name** column, click the employee name.



b. The Compensation Profile

In the **Compensation Profile**, you can make adjustments to the following amounts:

- Merit
- Market Rate
- Car Allowance
- Bonus

Compensation Profile for Employee

Employee		Division	South Western Ontario Portfolio (40475)	Location	Ontario (ON)
		Status	Active	Department	6 John St., Oakville, ON (40945)
		Manager	Jane Doe	Hire Date	06/01/2004
Salary Positioning					
Recommendations (CAD)					
Salary					
Department	6 John St., Oakville, ON	Job Title	Assistant Resident Manager		
Employee Number	1371	Hire Date	06/01/2004		
Review Rating	N/A				
Current Salary					
Employee Group	Hourly	Annualized Salary	\$20,800.00		
Hourly Rate	\$25.00	Annualized Hours	832		
Currency	CAD	Salary Grade			
Pay Range Min	N/A	Pay Range Max	N/A		
Merit					
Merit Increase (Hourly Rate)	\$0.00	0.00%	Budgeted Increase 2018 N/A		
Budgeted Increase 2018 Dollars	\$0.00	Increase Jan 2017 N/A			
Market Rate Adjustment					
Market Rate Adjustment	\$0.00	0.00%	Market Adj Budget (hrly) \$0.00		
Budget Market Adjustment	N/A				
Final Salary					
Final Salary Rate	\$25.00	Final Annualized	\$20,800.00		

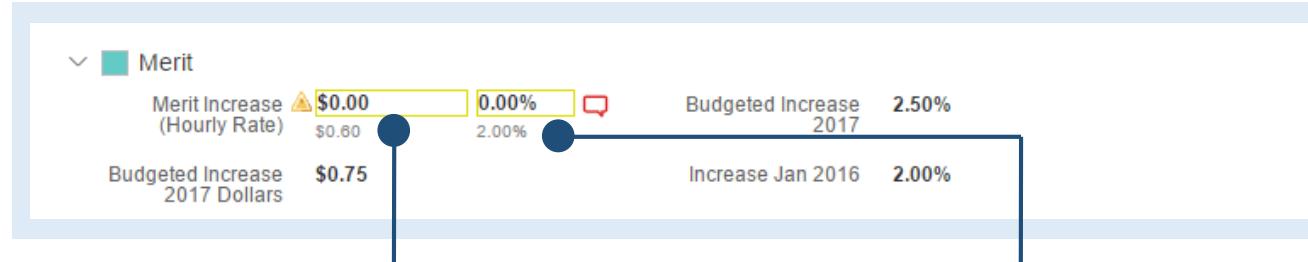
<< Previous Next >> Cancel Save

5. Making Adjustments to Salary Amounts

You will work frequently with the Compensation Profile. Complete the sections as required and follow the Merit and Bonus guidelines.

Car Allowance

If the car allowance amount does not equal to zero, enter the amount in the new Bi-weekly Car Allowance field even if it is not changing.



The screenshot shows the 'Merit' section of the Compensation Profile. It includes fields for 'Merit Increase (Hourly Rate)', 'Budgeted Increase 2017', 'Increase Jan 2016', and 'Budgeted Increase 2017 Dollars'. A yellow box highlights the 'Budgeted Increase 2017' field, which contains '\$0.00' and '2.50%'. A red box highlights the 'Increase Jan 2016' field, which contains '2.00%'. A blue circle points from the 'Increase Jan 2016' field to the 'Car Allowance' section below.

Entering an Amount

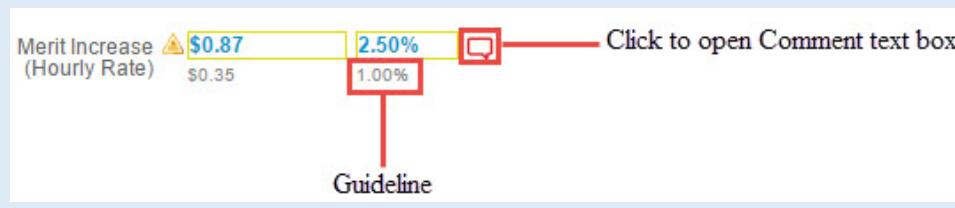
1. Double-click the text box.
2. Enter a dollar amount within the guideline (you can also enter a percent amount in the text box to the right).
3. Press Tab.
4. Click Save.

Understanding the Merit and Bonus Guidelines

When you enter a Merit or Bonus amount, you will see the guideline under the text box. This guideline will adjust according to the rating of the employee (**Note:** If the employee has no rating, the default guideline is displayed).

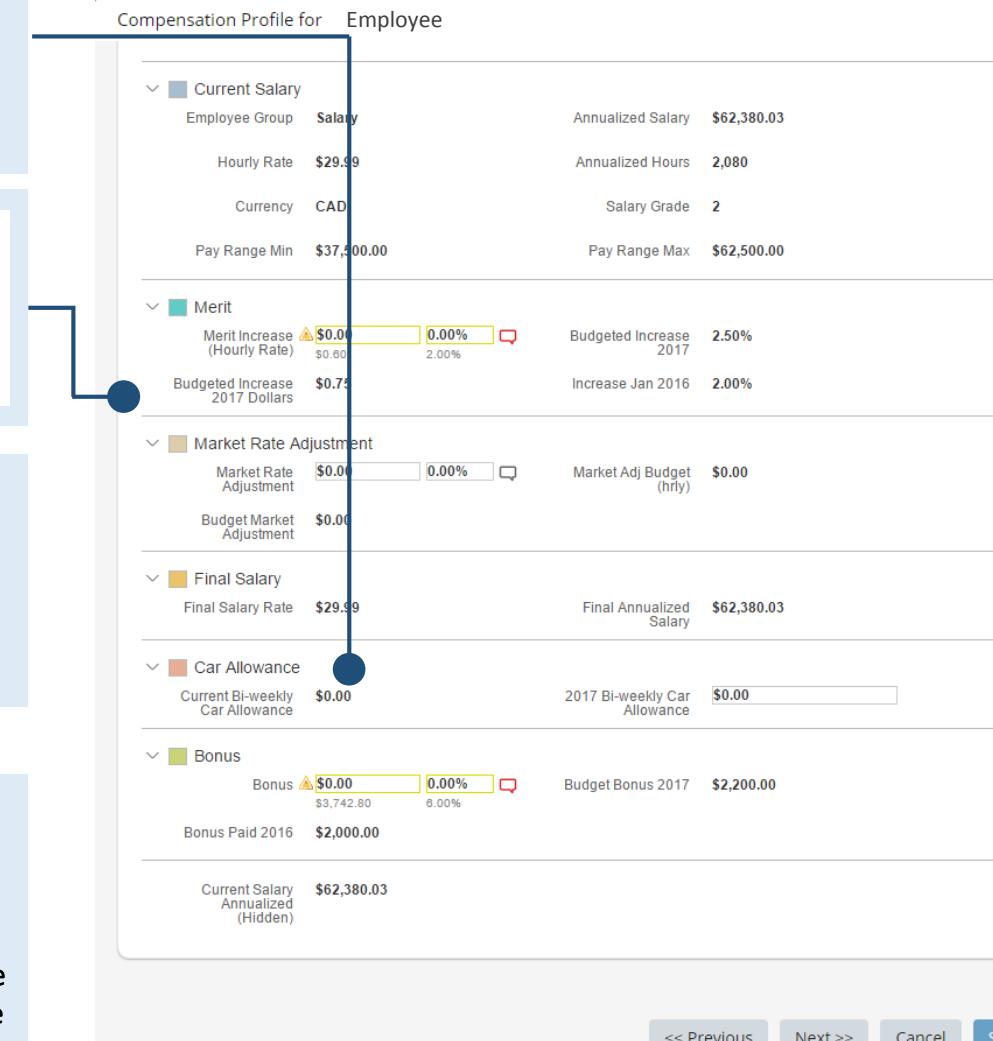
Entering an Amount Outside the Guideline

If you enter a merit or bonus amount outside the guideline, you must provide an explanation in the comment text box.



The screenshot shows the 'Merit Increase (Hourly Rate)' field with '\$0.87' and '2.50%' entered. A red box highlights the '2.50%' field, and a red arrow points to a 'Comment' text box with the placeholder 'Click to open Comment text box'. Another red arrow points from the 'Comment' text box to the 'Guideline' text below it.

*** If the merit increase is more than 4%, use the market rate adjustment field for the amount greater than the guideline.



The screenshot shows the full Compensation Profile for an employee. It includes sections for Current Salary, Merit, Market Rate Adjustment, Final Salary, Car Allowance, and Bonus. Each section has its own set of input fields and guidelines. A blue circle points from the 'Current Bi-weekly Car Allowance' field in the Car Allowance section to the 'Current Bi-weekly Car Allowance' field in the main section above.

<< Previous Next >> Cancel Save

6. Filtering the Compensation Management form

(a) Show/Hide Columns

You can filter columns in the form.

The screenshot shows a table with several sections: 'Employee Group', 'Merit Guidelines', 'Market Rate Adjustment', 'Final Salary', 'Car Allowance', and 'Apartment Al'. The 'Market Rate Adjustment' section is highlighted with a yellow background. A blue circle points to the 'Columns' button in the top menu bar, which is also highlighted with a yellow background. Below the table, a message says: 'To filter columns on the form, click Columns in the middle menu bar.'

Show/Hide Columns

To filter columns on the form, click **Columns** in the middle menu bar.

Sections

Select a section to be filtered. Each of these sections are in the Compensation Management form.

The dialog box has two main sections: 'Sections' on the left and 'Columns' on the right. The 'Sections' section lists various compensation components with their counts: Current Salary (10), Merit (5), Market Rate Adjustment (3), Final Salary (3), Car Allowance (4), Apartment Allowance (2), Bonus (4), Total Compensation (1), and Ungrouped (5). The 'Columns' section contains a list of checkboxes for selecting specific columns. A blue circle points to the 'Select All' checkbox. Another blue circle points to the 'Apply' button at the bottom right of the dialog.

Columns

Once you select a section, deselect a column. By default, all columns are selected.

Click Apply

Once you select the sections and columns, click **Apply**.

6. Filtering the Compensation Management form

(b) Filter Options

You can filter the form using specific categories.

The screenshot shows the Compensation Management form with various tabs like Current Salary, Merit, Market Rate Adjustment, Final Salary, Car Allowance, and Apartment Al. A blue callout points to the 'Filter Options' button in the top menu bar. Another blue callout points to the 'Find User' field in the 'Define Population' section of the 'Filter Options' dialog. A third blue callout points to the 'Apply Filter' button at the bottom right of the dialog. The dialog itself contains sections for 'Define Population' (with 'Individual View' and 'Team View' selected) and 'Filter' (with checkboxes for Division, Department, Location, Salary Grade, Route Step, Job Level, Employee Type, Employee Group, and Employee Category). The 'Employee Local Currency' tab is also visible at the top of the main form.

Filter Options
To filter by categories, click **Filter Options** in the middle menu bar.

Current Salary > Merit > Market Rate Adjustment > Final Salary > Car Allowance > Apartment Al
Employee Merit Market Rate Adjustment Final Salary Current Car Allowance Apartment Al
Group Guidelines Final Salary Rate Annualized Cun
Salary 1.00% \$ 0.00 0.00 % \$25.00 \$0.00
Salary 1.50% \$ 0.00 0.00 % \$25.00 \$0.00

Filter Options

Define Population

Individual View: **Find User**
Team View Starting from: **Myself** Find User Show Hierarchy Level: Direct Reports

Only show users with recommendations outside of guidelines/salary range

Division Department Location Salary Grade Route Step Job Level
Calgary Portfolio (20471) 1304 11 ST. SW, Calgary, Alberta (21304) Alberta (AB) 1 Completed Employee
135 Lynnview Rd. SE, Calgary, AB (21135) 2 Originator
4501 37th St. NW, Calgary, AB (20050) 3 Reviewer
501 40th Ave. NW, Calgary, AB (20140)
5300 Rundlehorn Drive, Calgary, AB (25300)
9100-9220 Bonaventure Dr., Calgary, AB (20944)
912 6th Ave, Calgary, AB (21912)
924 7 Ave. SW, Calgary, AB (20928)

Employee Type Employee Group Employee Category
Permanent Full Time Hourly Site
Permanent Full Time (non standard hours) Salary
Permanent Part Time

Filter
You can filter by different categories:

- Division
- Department
- Location
- Salary Grade
- Route Step
- Job Level
- Employee Type
- Employee Group
- Employee Category

Click Apply
Once you filter the form, click **Apply**.

Page 7

7. Sending the Form to your Manager for Approval

Once you make all the adjustments to the form and have saved it, send the form to your manager for approval.

Current Salary							
Review Rating	Employee Group	Annualized Salary	Hourly Rate	Annualized Hours	Currency	Salary Grade	Pay Range
3.14	Salary	\$36,987.60	\$18.97	1,950	CAD	2	\$19.23-\$32.05
3.57	Salary	\$62,380.03	\$29.99	2,080	CAD	2	\$19.23-\$32.05
unrated	Hourly	\$7,347.60	\$14.13	520	CAD		N/A
3.14	Salary	\$37,739.73	\$18.14	2,080	CAD	2	\$19.23-\$32.05
unrated	Hourly	\$11,019.71	\$13.67	806	CAD		N/A
unrated	Salary	\$64,328.94	\$32.99	1,950	CAD		N/A
							\$2,087,327.28

→ Send to Next Step **Cancel** **Save**

Notes

- The system will not let you go to the next step if the form is incomplete.
- If your manager approves the form, the form will be sent to HR.
- If your manager needs to make changes, the form will be sent back to you for editing. Your manager is unable to edit the form.

1

Click Save

Once you make all the individual adjustments, click **Save**.

2

Click Send to Next Step

Click **Send to Next Step** to send the form to your manager for approval.