

# Oracle

## Human Capital Management Cloud Implementing Workforce Compensation

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**Release 12**

This guide also applies to on-premises  
implementations

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# Contents

<b>Preface</b>	<b>i</b>
<hr/>	
<b>1 Overview</b>	<b>1</b>
Implementing Compensation: Overview	1
Managing an Implementation	2
<b>2 Lookups</b>	<b>5</b>
Workforce Compensation Lookups: Explained	5
Salary Component Lookups: Explained	6
External Data Lookups: Explained	6
Lookups: Explained	7
FAQs	10
<b>3 Eligibility Profiles</b>	<b>13</b>
Eligibility Components: How They Work Together	13
Derived Factors: Explained	14
Derived Factors: Examples	15
Eligibility Profiles: Explained	18
Combining Eligibility Criteria or Creating Separate Profiles: Points to Consider	20
Creating a Participant Eligibility Profile: Worked Example	22
Eligibility Profiles: Examples	25
FAQs	26

<b>4</b>	<b>Payroll for Third-Party HR</b>	<b>29</b>
	Overview	29
	Payroll Definitions: Explained	32
	Elements: Explained	33
	Element Input Values: Explained	34
	Element Eligibility: Explained	37
	Maintaining Elements: Explained	38
	Maintaining Element Eligibility: Explained	39
	Creating Payroll Elements for US Compensation: Procedure	39
	Determining an Element's Latest Entry Date: Critical Choices	45
	Element Duration Dates in Payroll Relationships: Explained	45
	Default Values for Element Entries: Critical Choices	47
	FAQs	48
<b>5</b>	<b>Fast Formulas</b>	<b>49</b>
	Using Formulas: Explained	49
	Compensation Currency Selection Formula Type	50
	Compensation Default and Override Formula Type	53
	Compensation Hierarchy Determination Formula Type	56
	Compensation Person Selection Formula Type	58
	Compensation Default Access Level Formula Type	60
	Total Compensation Item Formula Type	62
	Writing a Fast Formula Using Formula Text: Worked Example	65
	Formula Compilation Errors: Explained	67
	Formula Execution Errors: Explained	68
	FAQs	70

<b>6</b>	<b>Approvals</b>	<b>71</b>
	Salary and Individual Compensation Approval Tasks: Explained	71
	Defining Approvals for Human Capital Management: Explained	73
	Managing HCM Approval Transactions: Explained	74
	The Manager Hierarchy: How It's Maintained	74
	Approval Management Configuration Options for Oracle Fusion Human Capital Management: Explained	75
	Managing Approval Rules: Explained	76
	Approver Types: Explained	77
	HCM Approval Rules: Explained	79
	Management Hierarchy Approval-Rule Attributes	80
	Position Hierarchy Approval-Rule Attributes	82
	Defining an HCM Approval Policy: Worked Example	84
<b>7</b>	<b>Base Pay</b>	<b>89</b>
	Overview	89
	Salary Basis: How It Works With Salary Information and Payroll Processing	89
	How Many Salary Bases to Create: Points to Consider	91
	LDG and Payroll Element for Base Pay: Points to Consider	92
	Frequency and Annualization Factor on Salary Basis: Points to Consider	93
	Periodicity Conversion: Explained	94
	Salary Components on Salary Basis: Points to Consider	96
	Salary Component Lookups: Explained	97
	Grade Rate on Salary Basis: Points to Consider	98
	Validating Salaries: Points to Consider	98
	Calculating Full-Time Salary and Annualized Salary: Examples	99
	FAQs	102
<b>8</b>	<b>Grade Step Progression</b>	<b>103</b>
	Managing Grade Step Progression: Procedure	103
	Progression Grade Ladders: Explained	104
	Confirmation Types: Points to Consider	105
	Applying Progression Rules: Examples	105
	Proposed Progression and Salary Updates: Explained	107
	FAQs	108

<b>9</b>	<b>Individual Compensation Plans</b>	<b>109</b>
	Overview	109
	Plans: Explained	109
	Plan Access and Actions: Critical Choices	111
	Plans: Examples	112
	Tracking Off-Cycle Compensation Against a Budget: Procedure	114
	FAQs	114
<b>10</b>	<b>Compensation History</b>	<b>117</b>
	Categories: Explained	117
	Configuring Summary Table: Explained	117
	Managing Stock Grants in the Integrated Workbook: Procedure	118
	Setting Up the Desktop Integration for Excel: Procedure	119
	Using Desktop Integrated Excel Workbooks: Points to Consider	120
	Troubleshooting the Desktop Integration for Excel: Procedure	122
	FAQs	123
<b>11</b>	<b>Workforce Compensation Plan Details</b>	<b>125</b>
	Employment Records to Use: Points to Consider	125
	Actions and Reasons, Salary Components, and Plan Components: How They Work Together	126
	Plan Statuses: Explained	128
<b>12</b>	<b>Plan Eligibility</b>	<b>131</b>
	Eligibility Components: How They Work Together	131
	Ineligible Workers: Points to Consider	132
	FAQs	133
<b>13</b>	<b>Plan Cycles</b>	<b>135</b>
	Plan Cycle Dates: Explained	135
	Promotion Effective Date: Explained	135
<b>14</b>	<b>Hierarchies</b>	<b>137</b>
	Matrix Hierarchies: Explained	137
	Configuring Matrix Hierarchies: Points to Consider	138
	Hierarchy Determination Formula Type	139
	Default and Override Formula Type	142

<b>15</b>	<b>Compensation Budgets</b>	<b>147</b>
	Initiating Budgets: Points to Consider	147
	FAQs	147
<b>16</b>	<b>Compensation Components</b>	<b>149</b>
	Actions and Reasons, Salary Components, and Plan Components: How They Work Together	149
	Local Currency Determination: Points to Consider	151
	Currency Selection Formula Type	152
	FAQs	154
<b>17</b>	<b>Performance Ratings</b>	<b>155</b>
	Performance Ratings: Points to Consider	155
<b>18</b>	<b>Workforce Compensation Approvals</b>	<b>157</b>
	Configuring Approvals: Critical Choices	157
	Alternate Approver Hierarchy: Examples	158
	FAQs	161
<b>19</b>	<b>Worksheet Display</b>	<b>163</b>
	Worksheet Tab Types: Explained	163
	Compensation Tab Type: Explained	164
	Approvals Tab Type: Explained	165
	Performance Tab Type: Explained	166
	Promotions Tab Type: Explained	166
	Detail Table Only Tab Type: Explained	167
	Configuring Worksheet Tab Types: Examples	167
	Plan Setup Dependencies: Critical Choices	169
	Allocating Compensation by Percentage of Budget Amount: Points to Consider	170
	Static Worksheet Summary Columns: Explained	171
	Automatically Ranking Workers: Points to Consider	171
	Ranking Score: How It's Calculated	174
	Dynamic Calculations: Explained	176
	Using Dynamic Calculations: Examples	177
	Creating Dynamic Calculations: Worked Example	178
	FAQs	182

<b>20</b>	<b>Column Properties</b>	<b>185</b>
	Configuring Column Properties: Explained	185
	Configuring the General Tab: Explained	185
	Configuring the Visibility and Access Tab: Critical Choices	186
	Configuring the Default Values Tab: Points to Consider	187
	Configuring the Element Mapping Tab: Points to Consider	188
	Role Based Column Access: Examples	189
	Eligible Salary Column: Explained	191
	Varying Worksheet Column Results: Points to Consider	191
	Numeric Properties in Models: Explained	192
	Using External Data: Worked Example	193
	Cross Referencing Data Between Plans: Points to Consider	197
	Cross Referencing Data Between Plans: Examples	198
	Default and Override Formula Type	198
	Default and Override Formula Test Results: Explained	201
<b>21</b>	<b>Default Worksheet Display</b>	<b>203</b>
	FAQs	203
<b>22</b>	<b>Alerts</b>	<b>205</b>
	Predefined Alerts: Explained	205
	Creating Custom Alerts: Worked Example	205
	Custom Alerts: Examples	207
<b>23</b>	<b>Reports and Dimensions</b>	<b>209</b>
	OTBI Reports: Explained	209
	Dimensions: Explained	209
<b>24</b>	<b>Validation and Processing</b>	<b>211</b>
	Terminated Worker Processing: Explained	211
<b>25</b>	<b>Global Settings</b>	<b>213</b>
	Notification Text: Explained	213
	Notifications: How They Work	214
	Configuring the Tasks Pane of the Workforce Compensation Work Area: Explained	217
	FAQs	218





<b>26</b>	<b>Total Compensation Statement Overview</b>	<b>221</b>
	Overview	221
	Statement Definitions Explained	222
	Display Options in Statements	223
<b>27</b>	<b>Total Compensation Statement Components</b>	<b>227</b>
	Overview	227
	Items and Sources: Points to Consider	228
	Item Formula Type	230
	Category Types: Explained	233
	Categories and Subcategories: Points to Consider	234
	Category Level of Detail: Points to Consider	235
	Planning Statement Definitions: Points to Consider	236
	Statement Options: Points to Consider	237
	FAQs	237
<b>28</b>	<b>Total Compensation Worked Examples</b>	<b>241</b>
	Creating a Bonus Category: Worked Example	241
	Creating a Benefits Category: Worked Example	243
	Creating a Custom Category for Commissions: Worked Example	247
	Creating a Stock History Category: Worked Example	249
	Creating a Statement: Worked Example	251
<b>29</b>	<b>External Data</b>	<b>261</b>
	External Data Lookups: Explained	261
	Using External Data: Worked Example	261
	Importing External Data in the Integrated Workbook: Procedure	264
	FAQs	266




# Preface

This preface introduces information sources that can help you use the application.

## Oracle Applications Help

Use the help icon  to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon  in the global header. Not all pages have help icons. You can also access Oracle Applications Help at <https://fusionhelp.oracle.com>.

## Using Applications Help

 **Watch:** This video tutorial shows you how to find help and use help features.

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- **Community:** Use [Oracle Applications Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
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# 1 Overview

## Implementing Compensation: Overview

To plan your compensation implementation, consider the Compensation Management functional areas outlined in this topic. To get started, use the Offerings page in the Setup and Maintenance work area. Then configure your offerings and generate your task list.

### Offerings

You implement Workforce Compensation using the selected functional areas in the Compensation Management offering. Before you begin, use the Offerings page in the Setup and Maintenance work area to access reports for this offering. These reports include:

- Descriptions of the functional areas and features you can select when you configure the offering
- Lists of setup tasks
- Lists of business objects and enterprise applications associated with the offering

### Compensation Functional Areas

On the Setup: Compensation Management page in the Setup and Maintenance work area, enable compensation functional areas for implementation. The functional areas include the following:

- Base Pay
- Individual Compensation
- Workforce Compensation
- Total Compensation Statements

### Compensation Task Lists

You can access the compensation setup tasks on the Setup: Compensation Management page in the Setup and Maintenance work area. Select the functional areas that you want to implement.

The following table describes the task list for each of the Workforce Compensation functional areas:

Task List	Description
Base Pay	Tasks to configure payroll elements, compensation frequency values, and other data for quoting and paying base pay.
Individual Compensation	Tasks to configure compensation plans, payroll elements, and other data for allocating off-cycle compensation to individuals and tracking compensation history.

Task List	Description
Workforce Compensation	Tasks to create compensation plans and cycles used for compensating a group of workers. Configure the type of compensation allocated, the information displayed to managers, whether budgeting is used, eligibility criteria for the plan or component, and the approval hierarchy.
Total Compensation Statements	Tasks to configure the design, content, and delivery of a compensation statement that includes nontraditional forms of pay such as fringe benefits, cost of benefits, and paid time off, in addition to traditional forms of pay such as base pay and variable compensation.

## Prerequisite Human Resources and Payroll Setup Tasks

Before you use the compensation task lists, make sure you have completed the required tasks in the prerequisite functional areas within the Compensation Management offering. These include setting up enterprise structures, users and security, and prerequisite tasks for using payroll elements.

The following table identifies the guides that contain documentation for these prerequisite tasks.

HR and Payroll Solution	Documentation of Required Implementation Tasks
Oracle Global HR Cloud including Global Payroll	<p>Use the Implementing Global Human Resources guide for the HR implementation tasks.</p> <p>Most of the additional tasks required to implement payroll processing are in the Define Payroll task list in the Implementing Global Payroll guide.</p>
Oracle Global HR Cloud with third-party payroll solution	<p>Use the Implementing Global Human Resources guide for the basic setup, including elements, payroll definition, and so on.</p> <p>Use the Integrating with Oracle HCM Cloud guide to learn about HCM extracts and Global Payroll Interface.</p>
Oracle Talent Management Cloud with a third-party HR solution	<p>Use the Implementing Talent Management Base guide for the base implementation tasks.</p> <p>Use the Payroll for Third-Party HR chapter of the Implementing Workforce Compensation guide for the payroll-related setup tasks.</p>

### Related Topics

- [How Many Salary Bases to Create: Points to Consider](#)
- [Individual Compensation Plans: Explained](#)
- [Define Total Compensation Statements: Overview](#)
- [Define Elements, Balances, and Formulas: Overview](#)

## Managing an Implementation

## Enabling Offerings: Explained

When planning your implementation, you decide what business processes your organization or company performs or supports. These decisions determine the offerings and functional areas you want to implement. You then configure the offerings and functional areas that support the activities your organization or company performs. During the configuration process, you specifically enable offerings and functional areas for use before you implement them.

### Enabling Offerings and Functional Areas

Use the Setup and Maintenance work area to help decide which offerings to enable for implementation. Once you decide to use an offering, you can select the Configure button to choose the configuration details and enable the offering, associated functional areas, and features. All the base functional areas of an offering are automatically enabled for implementation when you enable the parent offering. You choose which optional functional areas to enable. The functional areas appear in an expandable and collapsible hierarchy to facilitate progressive decision making for implementation.

### Enabling Features

Features are optional or alternative business rules or methods used to fine-tune business processes and activities supported by an offering or a functional area. If features are available for the offering or functional areas, you can enable them to help meet your business requirements, if desired. In general, the features are set with a default configuration based on their typical usage in most implementations. You should always review the available features for the offering and functional areas and select them as appropriate. Dependent features appear visible when the feature choice they depend on is selected for implementation.

## Enabling Offerings: Procedure

You enable offerings to customize the functionality that matches the services you plan on implementing.

### Enabling Offerings

To enable offerings, follow these steps.

1. Open the Setup and Maintenance work area (**Navigator > Setup and Maintenance**).
2. In the Setup and Maintenance Offerings page, select the offering you're using, then click **Configure**.
3. In the Configure page, select the **Enable** check box for the offering. Also select the **Enable** check box for each of the functional areas you want to use.
4. Click the Features icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
5. Select **Done** to return to the Offerings page then repeat the same steps for each of the offerings you are using.





## 2 Lookups

### Workforce Compensation Lookups: Explained

This topic identifies the following lookups used in a workforce compensation cycle. You can modify the lookup types during initial implementation and at any later time using the Manage Lookups task in the Compensation work area.

- Reason
- Nonmonetary unit of measure
- Custom column

#### Reason Lookups

When you adjust a budget, you specify a reason for the adjustment. Adjustments and other budget changes appear in the budget audit history along with the reasons. You can add different adjustment values to the CMP\_BUDGET\_AUDIT\_REASONS lookup type. Values that start with CMP show only in audit history.

The following reasons are predefined:

- Worker eligibility change
- Eligible salary change
- Worker budget change
- Budget automatically issued
- Budget distributed by manager
- Manager budget change
- Worksheet budget change
- Worker reassignment
- Initial budget
- Miscellaneous adjustment
- Supplemental funding

#### Nonmonetary Unit of Measure Lookups

You use nonmonetary units of measure throughout workforce compensation. You can edit existing values or add values to the CMP\_NONMONETARY\_UOM lookup type.

The following nonmonetary units of measure are predefined:

- Days
- Hours
- Items
- Shares
- Units

## Custom Column Lookups

By configuring five custom lookup types, you can create custom columns that enable managers to select from a list of values. For example, you create a custom column called Up For Promotion. You configure the related custom lookup type to have two meanings: Yes and No. Managers can use the custom column to indicate which workers are up for promotion.

The related lookup codes must be numeric. Custom column lookup types are:

- CMP\_CWB\_CUST\_COL\_46\_LIST
- CMP\_CWB\_CUST\_COL\_47\_LIST
- CMP\_CWB\_CUST\_COL\_48\_LIST
- CMP\_CWB\_CUST\_COL\_49\_LIST
- CMP\_CWB\_CUST\_COL\_50\_LIST

The delivered value is Default.

## Salary Component Lookups: Explained

Salary components itemize new or adjusted salary to reflect different reasons for the allocation. You can edit or add components to the Salary Component lookup type during initial implementation and at any later time. The following salary components are predefined:

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

To add to or edit these codes in the CMP\_SALARY\_COMPONENTS lookup type, search for the Manage Common Lookups task in the Search: Tasks pane or All Tasks tab search area.

## Component Itemization

Component itemization is for notification purposes only. When component values change, the payroll element holds the new salary value calculated from the component adjustment. Payroll doesn't receive individual component values for processing.

## External Data Lookups: Explained

You can categorize data from third-party or legacy applications based on a lookup. You can edit or add new values to the External Data lookup type during initial implementation and at any later time. For example, you create a lookup code for your 401K plan data. The following external data lookups are predefined:

- Data from a legacy application
- Data from a third-party supplier

Use the Manage Lookups task in the Compensation work area to add or edit the lookup codes for the CMP\_EXTERNAL\_DATA\_RECORD\_TYPE lookup type.

## Lookups: Explained

Lookups are lists of values in applications. You define a list of values as a lookup type consisting of a set of lookup codes, each code's translated meaning, and optionally a tag. End users see the list of translated meanings as the available values for an object.

Lookups provide a means of validation and lists of values where valid values appear on a list with no duplicate values. For example, an application might store the values Y and N in a column in a table, but when displaying those values in the user interface, Yes or No (or their translated equivalents) should be available for end users to select. For example, the two lookup codes Y and N are defined in the REQUIRED\_INDICATOR lookup type.

In another example, a lookup type for marital status has lookup codes for users to specify married, single, or available legal partnerships.

Lookup Type	Lookup Code	Meaning	Tag
MAR_STATUS	M	Married	
	S	Single	
	R	Registered Partner	+NL
	DP	Domestic Partner	-FR, AU

In this case, tags are used for localizing the codes. All legislations list Married and Single. Only the Dutch legislation lists Registered Partner. And all legislations except France and Australia also list Domestic Partner.

When managing lookups, you need to understand the following.

- Using lookups in applications
- Customization levels
- Accessing lookups
- Enabling lookups

- The three kinds of lookups: standard, common, and set enabled

## Using Lookups in Applications

Use lookups to provide validation or a list of values for a user input field in a user interface.

An example of a lookup used for validation is a flexfield segment using a table-validated value set with values from a lookup type. An example of a lookup in a list of values is a profile option's available values from which users select one to set the profile option. Invoice Approval Status gives the option of including payables invoices of different approval statuses in a report. The lookup code values include All, so that users can report by all statuses: Approved, Resubmitted for approval, Pending or rejected, and Rejected.

## Customization Level

The customization level of a lookup type determines whether the lookups in that lookup type can be edited. This applies data security to lookups.

Some lookup types are locked so no new codes and other changes can be added during implementation or later, as needed. Depending on the customization level of a lookup type, you may be able to change the codes or their meanings. Some lookups are designated as extensible, so new lookup codes can be created during implementation, but the meanings of predefined lookup codes cannot be modified. Some predefined lookup codes can be changed during implementation or later, as needed.

The customization levels are user, extensible, and system. The following table shows which lookup management tasks are allowed at each customization level.

Allowed Task	User	Extensible	System
Deleting a lookup type	Yes	No	No
Inserting new codes	Yes	Yes	No
Updating start date, end date, and enabled fields	Yes	Yes, only if the code is not predefined data	No
Deleting codes	Yes	Yes, only if the code is not predefined data	No
Updating tags	Yes	No	No
Updating module	Yes	No	No

Predefined data means LAST\_UPDATED\_BY = SEED\_DATA\_FROM\_APPLICATION.

If a product depends on a lookup, the customization level must be system or extensible to prevent deletion.

Once the customization level is set for a lookup type, it can't be modified. The customization level for lookup types created using the Define Lookups page is by default set at the User level.

## Standard, Common, and Set-Enabled Lookups

The available kinds of lookups are as follows.

Lookup	Description
Standard	Lists the available codes and translated meanings
Set enabled	Additionally associates a reference data set with the lookup codes
Common	Legacy lookups

Standard lookups are the simplest form of lookup types consisting only of codes and their translated meaning. They differ from common lookups only in being defined in the standard lookup view.

Common lookups exist for reasons of backward compatibility and differ from standard lookups only in being defined in the common lookup view.

Set enabled lookup types store lookup codes that are enabled for reference data sharing. At runtime, a set-enabled lookup code is visible because the value of the determinant identifies a reference data set in which the lookup code is present.

## Accessing Lookups

Standard, set-enabled, and common lookups are defined in the Standard, Set-enabled, and Common views, respectively. Applications development may define lookups in an application view to restrict the UI pages where they may appear.

In lookups management tasks, lookups may be associated with a module in the application taxonomy to provide criteria for narrowing a search or limiting the number of lookups accessed by a product specific task such as Manage Purchasing Lookups.

## Enabling Lookups

A lookup type is reusable for attributes stored in multiple tables.

Enable lookups based on the following.


- Selecting an **Enabled** check box
- Specifying an enabled start date, end date, or both
- Specifying a reference data setdeterminant

If you make changes to a lookup, users must sign out and back in before the changes take effect. When defining a list of values for display rather than validation, limit the number of enabled lookup codes to a usable length.

For more information on the predefined lookups and lookup codes, open the Setup and Maintenance work area, and use the tasks in the Define Lookups task list.

## Translating Lookups

You can translate the lookups that you defined to the preferred language(s) without changing the language session of the application. Use the translation option available on the lookup code table. By default, for each lookup, all the allowed language rows in the translator dialog box appear in the source language (the current session language). When you edit a particular language entry, you can modify the translated meaning and description to the language in which you want the lookup to appear. Once the updates are made, the end-users can view the lookup in the translated text.

 **Note:** You can add the translation for only as many languages as are permitted by the administrator. The functionality to limit the number of languages displayed on the dialog box is controlled through the Translation Editor Languages profile option. It can be set at the SITE or USER level. If nothing is specified, all active languages are displayed.

### *Related Topics*

- [Modules in Application Taxonomy: Explained](#)
- [Managing Set-Enabled Lookups: Examples](#)
- [What's the difference between a lookup type and a value set?](#)
- [Managing a Standard Lookup: Example](#)

## FAQs

### How can I edit lookups?

On the Define Lookups page, you can edit the existing lookup codes of a lookup type or add new lookup codes. To open the page, navigate to the Setup and Maintenance work area and search for the Define Lookup task list.

The task list contains three tasks:

- Standard Lookups
- Common Lookups
- Set-enabled Lookups

Each task contains a predefined set of lookup types classified and stored as per the functionality. Open a task to search and edit the required lookup. However, you may not be able to edit a lookup if its customization level doesn't support editing.

### Why can't I see my lookup types?

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types. However, the generic tasks provide access to all lookup types of a kind, such as common lookups associated with the Manage Common Lookups task.

If the lookup types in an application are available in the standard, common, or set-enabled lookups view, they are central to an application. However, lookup types defined for a specific application are managed using the task or task list for that application.

## How can I access predefined lookups?

Search for predefined lookups using the Define Lookups task list:

1. In the Setup and Maintenance work area, search for the **Define Lookups** task list and expand it to view the tasks.
2. Open the task that corresponds to the lookups you are searching for.
3. Enter any of the search parameters and click **Search**. If you don't know the lookup type or the meaning, use the **Module** field to filter search results.
4. Click a lookup type to view its lookup codes.

 **Tip:** Click the Query By Example icon to filter the lookup codes.

### *Related Topics*

- [Using Query By Example: Procedure](#)



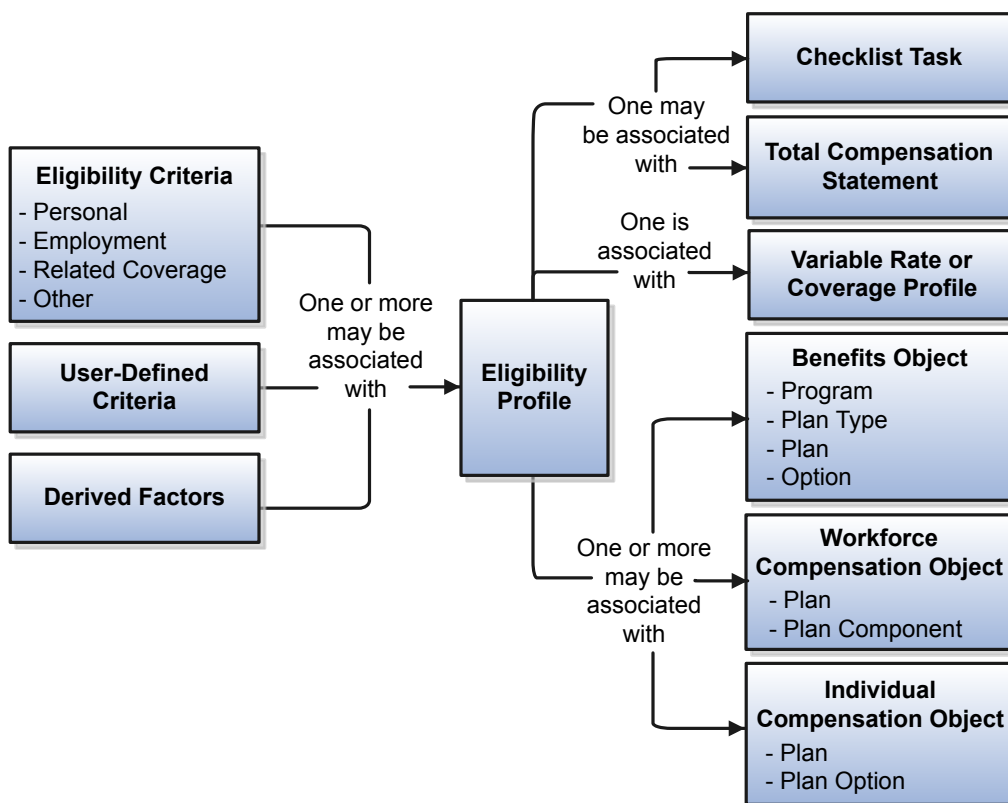


## 3 Eligibility Profiles

### Eligibility Components: How They Work Together

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility.

The following figure shows the relationships between eligibility components.



#### Eligibility Criteria

You can add different types of eligibility criteria to an eligibility profile. For many common criteria, such as gender or employment status, you can select from a list of predefined criteria values. However, you must create user-defined criteria and derived factors before you can add them to an eligibility profile.

#### Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.

## Associating the Profile with Objects

This table describes associating eligibility profiles with different kinds of objects and whether you can attach more than one profile.

More than One Profile?	Associated Objects	Purpose
No	Variable rate or variable coverage profile	Establish the criteria required to qualify for that rate or coverage
No	Checklist task	Control whether that task appears in an allocated checklist
No	Total compensation statement	Apply additional eligibility criteria after statement generation population parameters
Yes	Benefits object	Establish the eligibility criteria for specific programs, plans, and options
Yes	Compensation object	Establish the eligibility for specific plans and options
Yes	Performance documents	Establish the eligibility for performance documents
Yes	Goal plans or goal mass assignments	Establish eligibility for the goal
One or more	Absence plan	Determine the workers who are eligible to record an absence that belongs to that plan

### Related Topics

- [User-Defined Criteria: Explained](#)

## Derived Factors: Explained

Derived factors define how to calculate certain eligibility criteria that change over time, such as a person's age or length of service. You add derived factors to eligibility profiles and then associate the profiles with objects that restrict eligibility.

### Derived Factor Types

Using the **Manage Derived Factors** task, you can create six different types of derived factors:

- Age
- Length of service
- A combination of age and length of service

- Compensation
- Hours worked
- Full-time equivalent

## Determination Rules and Other Settings

For each factor that you create, you specify one or more rules about how eligibility is determined. The following table provides example settings for two factors.

Factor	Example Settings
Age derived	<p>Select a determination rule to specify the day on which to evaluate the person's calculated age for eligibility.</p> <p>Example: If the determination rule is set to the first of the year, then the person's age as of the first of the year is used to determine eligibility.</p>
Full-time equivalent	<p>Specify the minimum and maximum full-time equivalent percentage and whether to use the primary assignment or the sum of all assignments when evaluating eligibility.</p> <p>Example: If 90 to 100 percent is the percentage range for the sum of all assignments, then a person who works 50 percent full-time on two different assignments is considered eligible.</p>

For derived factors pertaining to time and monetary amounts, you can also set the following rules:

- Unit of measure
- Rounding rule
- Minimum and maximum time or amount

## Derived Factors: Examples

The following scenarios illustrate how to define different types of derived factors:

### Age

Benefits administrators frequently use age factors to determine:

- Dependent eligibility
- Life insurance rates

Age factors typically define a range of ages, referred to as age bands, and rules for evaluating the person's age. The following table illustrates a set of age bands that could be used to determine eligibility for life insurance rates that vary based on age.

Derived Factor Name	Greater Than or Equal To Age Value	Less Than Age Value
Age Under 25	1	25

Derived Factor Name	Greater Than or Equal To Age Value	Less Than Age Value
Age 25 to 34	25	35
Age 35 to 44	35	45
Age 45 to 54	45	55
Age 55 to 64	55	65
Age 64 or Older	65	75

The determination rule and other settings for each age band are the same:

Field	Value
<b>Determination Rule</b>	First of calendar year
<b>Age to Use</b>	Person's
<b>Units</b>	Year
<b>Rounding</b>	None

## Length of Service

A derived factor for length of service defines a range of values and rules for calculating an employee's length of service. The following table shows an example of a set of length-of-service bands. You can use the length-of-service bands to determine eligibility for compensation objects such as bonuses or severance pay.

Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service Less Than 1	0	1
Service 1 to 4	1	5
Service 5 to 9	5	10
Service 10 to 14	10	15
Service 15 to 19	15	20
Service 20 to 24	20	25

Derived Factor Name	Greater Than or Equal To Length of Service Value	Less Than Length of Service Value
Service 25 to 29	25	30
Service 30 Plus	30	999

The determination rule and other settings for each length-of-service band are the same:

Field	Value
<b>Period Start Date Rule</b>	Date of hire This sets the beginning of the period being measured.
<b>Determination Rule</b>	End of year This sets the end of the period being measured.
<b>Age to Use</b>	Person's
<b>Units</b>	Year
<b>Rounding</b>	None

## Compensation

A derived factor for compensation defines a range of values and rules for calculating an employee's compensation amount. The following table shows an example of a set of compensation bands. You can use the compensation bands to determine eligibility for compensation objects such as bonuses or stock options.

Derived Factor Name	Greater Than or Equal To Compensation Value	Less Than Compensation Value
Less than 20000	0	20,000
Salary 20 to 34000	20,000	35,000
Salary 35 to 49000	35,000	50,000
Salary 50 to 75000	50,000	75,000
Salary 75 to 99000	75,000	100,000
Salary 100 to 200000	100,000	200,000

Derived Factor Name	Greater Than or Equal To Compensation Value	Less Than Compensation Value
Salary 200000 Plus	200,000	999,999,999

The determination rule and other settings for each compensation band are the same:

Field	Value
<b>Determination Rule</b>	First of year
<b>Unit of Measure</b>	US Dollar
<b>Source</b>	Stated compensation
<b>Rounding</b>	Rounds to nearest hundred

## Eligibility Profiles: Explained

Create eligibility profiles to define criteria that determine whether a person qualifies for objects that you associate the profile with. You can associate eligibility profiles with objects in a variety of business processes.

The following are key aspects of working with eligibility profiles:

- Planning and prerequisites
- Specifying the profile type, usage, and assignment usage
- Defining eligibility criteria
- Excluding from eligibility
- Assigning sequence numbers
- Adding multiple criteria
- Viewing the criteria hierarchy

## Planning and Prerequisites

Before you create an eligibility profile, consider the following:

- If an eligibility profile uses any of the following to establish eligibility, you must create them before you create the eligibility profile:
  - Derived factors
  - User-defined formulas
  - User-defined criteria

- Consider whether to combine criteria into one profile or create separate profiles depending on:
  - Whether the object for which you're creating eligibility accepts only one eligibility profile or more than one
  - Performance considerations
- Use names that identify the criteria being defined rather than the object with which the profile is associated, because eligibility profiles are reusable.

Example: Use Age20-25+NonSmoker rather than Supplemental Life-Minimum Rate.

## Specifying Profile Type, Usage, and Assignment Usage

This table describes the basic profile attributes that you specify when you create an eligibility profile:

Setting	Description
<b>Profile Type</b>	<p>Use only dependent profiles for Benefits plans or plan types when determining eligibility of participants' spouses, family members, or other individuals who qualify as dependents.</p> <p>All other profiles are participant profiles.</p>
<b>Usage</b>	<p>Determines the type of objects the participant profile can be associated with, such as benefits offerings and rates, compensation plans, checklist tasks, goal plans or mass goal assignments, or performance documents.</p> <p>Selecting <b>Global</b> makes the profile available to multiple business process usages.</p>
<b>Assignment to Use</b>	<p>Determines the assignment that the eligibility process evaluates for the person</p> <ul style="list-style-type: none"> <li>Select <b>Specific assignment</b> when the usage is Compensation or Performance.</li> <li>Select a value that includes <b>benefit relationship</b> when the usage is Benefits. You select this value to restrict eligibility evaluation to active assignments that are associated with the benefits relationship of the person on a given date. If you select other values, then you might need to include eligibility criteria to exclude inactive assignments.</li> <li>Select one of the following values for all other usages, such as total compensation statements:           <ul style="list-style-type: none"> <li>Any assignment - enterprise</li> <li>Employee assignment only - enterprise</li> <li>Primary employee assignment only - enterprise</li> </ul> </li> </ul>

## Defining Eligibility Criteria

Criteria defined in an eligibility profile are divided into categories:

Category	Description
Personal	Includes gender, person type, postal code ranges, and other person-specific criteria.
Employment	Includes assignment status, hourly or salaried, job, grade, and other employment-specific criteria.

Category	Description
Derived factors	Includes age, compensation, length of service, hours worked, full-time equivalent, and a combination of age and length of service.
Other	Other: Includes miscellaneous and user-defined criteria.
Related coverage	Includes criteria based on whether a person is covered by, eligible for, or enrolled in other benefits offerings.

Some criteria, such as gender, provide a fixed set of choices. The choices for other criteria, such as person type, are based on values defined in tables. You can define multiple criteria for a given criteria type.

## Excluding from Eligibility

For each eligibility criterion that you add to a profile, you can indicate whether persons who meet the criterion are considered eligible or are excluded from eligibility. For example, an age factor can include persons between 20 and 25 years old or exclude persons over 65.

If you:

- Exclude certain age bands, then all age bands not explicitly excluded are automatically included.
- Include certain age bands, then all age bands not explicitly included are automatically excluded.

## Assigning Sequence Numbers

You must assign a sequence number to each criterion. The sequence determines the order in which the criterion is evaluated relative to other criteria of the same type.

## Adding Multiple Criteria

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

## Viewing the Criteria Hierarchy

Select the View Hierarchy tab to see a list of all criteria that you have saved for this profile. The list is arranged by criteria type.

### *Related Topics*

- [User-Defined Criteria: Explained](#)



## Combining Eligibility Criteria or Creating Separate Profiles: Points to Consider

You can define multiple criteria in an eligibility profile or create separate profiles for individual criterion. To determine the best approach, consider the following:

- Does the object for which you are defining eligibility allow multiple eligibility profiles?
- What is the best approach in terms of efficiency and performance?
- Are your criteria both inclusive and exclusive?

### Allowable Number of Eligibility Profiles

If an object permits only one eligibility profile, you must include all criteria in a single profile.

The following table shows which objects permit only one profile and which permit more.

Only One Profile	One or More Profiles
<ul style="list-style-type: none"> <li>• Checklist tasks</li> <li>• Variable rate profiles</li> <li>• Variable coverage profiles</li> <li>• Total compensation statements</li> <li>• Absence types</li> </ul>	<ul style="list-style-type: none"> <li>• Benefits offerings</li> <li>• Individual and workforce compensation plans</li> <li>• Performance documents</li> <li>• Goal plans or mass goal assignments</li> <li>• Absence plans</li> </ul>

### Efficiency and Performance in the Benefits Hierarchy

For optimum performance and efficiency, attach profiles at the highest possible level in the benefits object hierarchy and avoid duplicating criteria at lower levels. For example, to be eligible for a plan type, a person must satisfy eligibility profiles defined at the program and plan type in program levels.

The following objects inherit the eligibility criteria associated with the program:

- Plan types in program
- Plans in program
- Plans
- Options in plans that are in programs

However, it's sometimes more efficient to create more than one profile and attach the profiles at various levels in the hierarchy. The following table illustrates applying successively restrictive exclusion criteria at different levels in the hierarchy:

Level	Eligibility Profile Criteria
Program	Exclude employees who do not have an active assignment.
Plan type in program	Exclude employees who do not have a full-time assignment.

Level	Eligibility Profile Criteria
Plan	Exclude employees whose primary address is not within a defined service area.

## Using Both Inclusive and Exclusive Criteria

Eligibility criteria can be used to include or exclude persons from eligibility. Sequencing of criteria is more complicated when you mix included and excluded criteria in the same profile. For ease of implementation, keep excluded criteria in a separate eligibility profile.

### Related Topics

- [Configuring Eligibility Criteria at General Vs. Detailed Hierarchy Levels: Example](#)

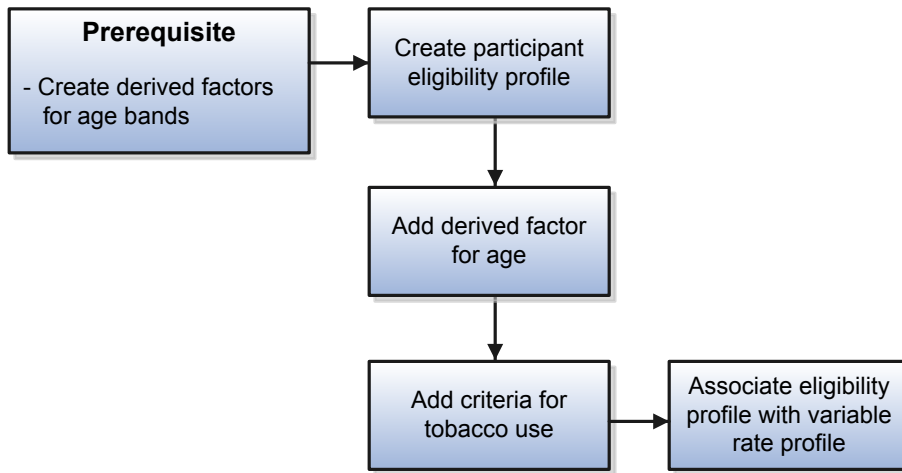
## Creating a Participant Eligibility Profile: Worked Example

This example demonstrates how to create a participant eligibility profile used to determine eligibility for variable life insurance rates. Use the Plan Configuration work area to complete these tasks.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In this Example
What is the profile type?	Participant
What type of object is associated with this profile?	Variable rate for benefits offering
What types of eligibility criteria are defined in this profile?	Age derived factor (must have been previously defined) Uses Tobacco criteria
Should persons meeting these criteria be included or excluded from eligibility?	Included

The following figure shows the tasks to complete in this example:



In this example, you create one eligibility profile that defines the requirements for a single variable rate.

- Typically, you create a set of eligibility profiles, one for each variable rate.
- Create a separate profile for each additional rate by repeating the steps in this example, varying the age and tobacco use criteria.

## Prerequisites

1. Create an age derived factor for ages less than 30.

## Creating the Eligibility Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Eligibility Profiles** to open the Manage Eligibility Profiles page.
2. On the Create menu, select **Create Participant Profile**.
3. In the Eligibility Profile Definition section, complete the fields as shown in this table.

Field	Value
<b>Name</b>	Age Under 30+ Non-Smoking
<b>Profile Usage</b>	Benefits
<b>Status</b>	Active
<b>Assignment to Use</b>	Any assignment - benefit relationship

## Adding the Derived Factor for Age

Use default values for fields unless the steps specify other values.

1. In the Eligibility Criteria section, select the **Derived Factors** tab.
2. On the Age tab, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
<b>Sequence</b>	1
<b>Age</b>	Select the derived factor that you previously defined for ages under 30
<b>Exclude</b>	Make sure that it is not selected

## Adding the Criteria for Tobacco Use

Use default values for fields unless the steps specify other values.

1. Select the **Personal** tab.
2. On the Uses Tobacco tab, click **Create**.
3. Complete the fields as shown in this table.

Field	Value
<b>Sequence</b>	1
<b>Tobacco Use</b>	None
<b>Exclude</b>	Make sure that it is not selected

4. Click **Save and Close**.

## Associating the Eligibility Profile with a Variable Rate Profile

Use default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Manage Benefits Rates** to open the Manage Benefits Rates page.
2. Select the **Variable Rates** tab.
3. Click **Create**.
4. In the **Eligibility Profile** field, select the eligibility profile you just created.
5. Complete other fields as appropriate for the rate.

6. Click **Save and Close**.

#### Related Topics

- [Creating a Variable Rate: Worked Example](#)

## Eligibility Profiles: Examples

The following examples show how to use eligibility profiles to determine which workers are eligible for a plan, compensation object, and checklist task.

In each case, you:

1. Create the eligibility profile using the Manage Eligibility Profiles task, which is available in several work areas, including Setup and Maintenance.
2. Associate the eligibility profile with the relevant object, such as a benefit plan.

## Savings Plan Eligibility

A savings plan, such as a 401k plan, is restricted to full-time employees under 65 years of age. Create an eligibility profile to associate with your plan.

The following table provides the values for the eligibility profile definition.

Field	Value
<b>Profile Usage</b>	Benefits
<b>Profile Type</b>	Participant

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Assignment Category	Full-Time	No
Derived Factor	Age	Select an age derived factor for the age band of 65 and older	Yes

## Bonus Eligibility

You offer a bonus to all employees who received the highest possible performance rating in all rating categories. Create an eligibility profile to associate with your Bonus compensation object.

The following table provides the values for the eligibility profile definition.

Field	Value
<b>Profile Usage</b>	Compensation, or Global
<b>Profile Type</b>	Participant
<b>Assignment to Use</b>	Specific Assignment

The following table provides the values for the eligibility criteria for each rating category.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Performance Rating	Select the performance template and rating name, and then select the highest rating value	No

## Checklist Task Eligibility

A new hire checklist contains tasks that don't apply to employees who work in India. Create an eligibility profile to associate with each checklist task that doesn't apply to workers in India.

The following table provides the values for the eligibility profile definition.

Field	Value
<b>Profile Usage</b>	Checklist
<b>Profile Type</b>	Participant

The following table provides the values for the eligibility criteria.

Criteria Type	Name	Values	Select Exclude Check Box
Employment	Work Location	India	Yes

### Related Topics

- [How can I restrict benefits enrollment opportunities based on provider location?](#)
- [Configuring Grandfathered Benefits Eligibility: Procedure](#)

## FAQs

## What happens if I include multiple criteria in an eligibility profile?

If you define multiple values for the same criteria type, such as two postal code ranges, a person must satisfy at least one of the criteria to be considered eligible. For example, a person who resides in either postal range is eligible.

If you include multiple criteria of different types, such as gender and age, a person must meet at least one criterion defined for each criteria type.

## What happens if I don't select the Required option when I add an eligibility profile to an object?

If you add only one eligibility profile to an object, then the criteria in that profile must be satisfied, even if the **Required** option isn't selected.

If you add multiple eligibility profiles, the following rules apply:

- If all profiles are optional, then at least one of the profiles must be satisfied.
- If all profiles are required, then all of the profiles must be satisfied.
- If some but not all profiles are required, then all required profiles must be satisfied and at least one optional profile must also be satisfied.






# 4 Payroll for Third-Party HR

## Overview

The Define Elements, Balances, and Formulas task list contains the tasks required for creating payroll elements for compensation and HR management. You can use this task list if you're recording earnings, deductions, and other payroll data for reporting, compensation and benefits calculations, or transferring data to a third-party payroll provider.

 **Note:** If you're using Oracle Fusion Global Payroll, use the Define Payroll task list instead. The Define Payroll task list includes additional tasks required to set up payroll processing.

## Required Tasks

Your business requirements and product usage determine which required tasks and other payroll-related tasks you perform. The required tasks are:

- Manage Elements
- Manage Payroll Definitions, which is usually required to support elements
- Manage Consolidation Groups, which is required for creating payroll definitions

If you use predefined Payroll Interface extracts to transfer data to a third-party payroll provider, you may need to create element subclassifications, balances, organization payment methods, and object groups. Refer to the Global Payroll Interface documentation for more information.

## Prerequisite Tasks

The Workforce Deployment and Compensation Management offerings include the Define Elements, Balances, and Formulas task list. These offerings contain other tasks that you must complete first, as shown in the following table.

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

## Configure Legislations for Human Resources

Use this task to create and edit legislative data for a country or territory that doesn't have a predefined country extension. It guides you through configuring some payroll objects and values required for creating elements, including:

- Tax year start date
- Period of service on rehire rules
- Default currency
- Element classifications
- Component groups
- Payment types

**! Important:** Complete this task before the other tasks in this task list.

## Manage Elements

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

Source Application	Element Purpose	Requirements
Compensation	<ul style="list-style-type: none"> <li>• Earnings and deduction elements, such as bonuses, overtime earnings, and voluntary deductions.</li> <li>• Information elements to load custom data to use during a workforce compensation cycle.</li> </ul>	Required for compensation plans and base pay, no matter which HR and payroll applications you're using.
Benefits	<ul style="list-style-type: none"> <li>• Deduction elements to record activity rate calculation results, such as: <ul style="list-style-type: none"> <li>◦ Employee contributions and employer distributions for medical options</li> <li>◦ Flex credits for flex offerings</li> </ul> </li> <li>• Earnings elements if you set up your flex offering to disburse unused credits as cash.</li> </ul>	<p>Required if you use element entries to communicate benefits rate information to any payroll application.</p> <p><b>Restriction:</b> You must select Payroll Relationship as the employment level.</p>
Time and Labor	Earnings elements with input value of Hours.	Required if you pay worked time based on time card entries.
Absence Management	Earnings elements with input value of Hours.	Required if you process absence payments and book employer liability of accrual balances through Global Payroll or Global Payroll Interface.

## Manage Payroll Definitions

Employees' employment terms or assignments include their assigned payrolls. The payroll definition supplies the payroll period frequency and end dates, which some applications use for calculations. The following table shows which Oracle Fusion HCM applications require payroll definitions.

Application	Payroll Definition Required?	Usage Conditions
Global Payroll Interface	Yes	N/A
Compensation	Yes	N/A
Benefits	Optional	Required to use the payroll period frequency to calculate communicated rates or values passed to payroll.
Time and Labor	Optional	Required to pass time entries to payroll calculation cards for payroll processing or for extract to a third-party payroll application.
Absence Management	No	N/A

## Manage Consolidation Groups

You must have at least one consolidation group for each legislative data group where you create elements. Payroll definitions require a consolidation group.

## Other Payroll-Related Setup Tasks

Your implementation might require other tasks in the Define Elements, Balances, and Formulas task list, as shown in the following table.

Task	Requirements
Manage Organization Payment Methods	If you want to record personal payment methods for your employees, you must create organization payment methods and associate them with your payroll definitions. Organization payment methods define the combination of payment type and currency to use for payments to employees or external parties.
Manage Element Classifications	Primary element classifications are predefined. If you run the Calculate Gross Earnings process (provided with Global Payroll Interface), you might create subclassifications to feed user-defined balances.

Task	Requirements
Manage Fast Formulas	<p>You can write formulas for a number of uses, including:</p> <ul style="list-style-type: none"> <li>Validating user entries into element input values</li> <li>Configuring compensation, benefit, and accrual plan rules</li> <li>Calculating periodic values for gross earnings and defining element skip rules for the Calculate Gross Earnings process (provided with Global Payroll Interface)</li> </ul>
Manage Balance Definitions	<p>If you're using Global Payroll Interface, creating earnings elements creates balances automatically. You can edit these generated balance definitions.</p> <p>If you're using the Calculate Gross Earnings process, you may want to create additional balances for extracts or reporting.</p>
Manage Object Groups	<p>You can create object groups to specify subsets of elements or payroll relationships to include in a report or process, such as the Calculate Gross Earnings process.</p>

### Related Topics

- Using Formulas: Explained
- Payroll Balance Definitions: Explained
- Implementing Payroll Interface: Procedure
- Elements: How They Hold Payroll Information for Multiple Features

## Payroll Definitions: Explained

Payroll definitions contain calendar and offset information, which determines when to calculate and cost payments. Use the Manage Payroll Definitions task in the Payroll Calculation work area to specify payment frequency, processing schedule, and other parameters for a particular payroll. Payroll period types, such as weekly or monthly, determine the interval at which you pay employees.

Create at least one payroll definition for each payroll period type that you use to pay employees. For example, to pay employees semimonthly, create a payroll definition using the semimonthly payroll period type, ensuring that tax calculations and other calculations produce correct results for those employees.

## Creating Payroll Definitions

When you create a payroll definition, the application generates the complete payroll schedule based on the payroll period type, any offsets or calendar adjustments, and the number of years that you specify. Each payroll in the schedule is assigned a unique name. After you have saved a payroll definition, you can assign employees to it on the Manage Payroll Relationships page. A common scenario for creating a payroll definition is to replace one that is expired or end-dated.

Each payroll must belong to a consolidation group, which the application requires for processing purposes. Before you can create a payroll definition, the legislative data group and the consolidation group to use for it must already exist.

## Modifying Payroll Definitions

When you modify a payroll definition, the application adjusts the payroll schedule based on the values you have modified. A common scenario for modifying an existing payroll definition is to increase the number of years and generate more payroll time periods that extend the payroll calendar.

 **Note:** You can extend the payroll calendar by increments of ten or fewer years.


The names of the payrolls in the payroll schedule are unique. You can edit the generated payroll names, but you must ensure they are unique within the payroll definition.

### *Related Topics*

- [Creating Payroll Definitions: Worked Example](#)
- [Managing Payroll Definitions: Points to Consider](#)

## Elements: Explained

Some elements are predefined. You can also create other elements to match your requirements. Each element belongs to a primary classification, according to its purpose, which determines the template you use to create it. The template creates the elements and, depending on your country extension, associated items required for payroll processing.

 **Note:** You can enter up to 50 characters for the element name. If you enter more than 50 characters, the application will automatically shorten the name.

Elements can represent:

- Earnings, such as salary, wages, and bonuses
- Compensation, such as employee stock purchase and insurance plans
- Absences from work
- Tangible items distributed to persons, such as tools, uniforms, mobile phones, or computers
- Statutory deductions, such as taxes, voluntary deductions, contributions to charities or savings plans, and involuntary deductions, such as court orders and pretax deductions
- Employer taxes and other employer liabilities

## Predefined Elements


The predefined elements are specific to your country or territory. They typically include deductions for tax and wage attachments. You can't make any changes to these predefined elements. However, you must create eligibility records for them.

## Element Creation

You can create as many earnings and deductions as you require using the Manage Elements task.

You select the element classification and category which determine:

- The template of questions you answer to specify the details of the element you want to create.
- The items that the template generates, which can include multiple elements, input values, formulas, balances, and other items as set out in the table below.

 **Note:** The template you use to create elements also depends on the extension selected for your country or territory on the Manage Features by Country or Territory page. For example, if the country extension is set to Payroll, you use a template that generates all the items required for payroll processing. If the country extension is set to Human Resources or None, you use a basic template that generates the elements only. However, if you select an element classification, such as Standard Earnings, Supplemental Earnings, Direct Payments and Taxable Benefits, the basis template creates input values for Amount, Periodicity, and Full-Time Equivalent.

You can configure any of the generated items to match your specific business requirements. For example, you can add input values, edit the formulas, or add a status processing rule to use a different formula for certain assignment statuses. You must also create element eligibility records for the elements. You can also use the batch loader from the Data Exchange or Checklist work area to load elements or migrate elements between environments.

The following table explains the purpose of the items used in element creation.

Item	Purpose
Input Values	Define the entry values available on each entry of this element, such as hours worked or amount.
Element Eligibility Records	Define the eligibility criteria a worker's employment record must meet to be eligible for the element. For example you can use grade, payroll, salary basis, or organization as eligibility criteria.
Status Processing Rules	Identify the formula the payroll run uses to process the element, and how to handle the formula results.
Related Formulas and Related Elements	Identify additional elements and formulas created by the template for payroll processing.
Related Balances	Identify the balances created by the element template for this element.

#### *Related Topics*

- [Creating Earnings Elements for Payroll: Worked Example](#)
- [Formula Result Rules for Elements: Explained](#)

## Element Input Values: Explained

An element's input values define the entry values available on each entry of this element. Each input value has a unit of measure, such as money or date. Input values can include validations and conditions to control the data entry of the element entry assigned to a person. For example, an earnings element may have an input value for hours worked, which is required and has a unit of measure of number.

When you create an element, some input values are created automatically depending on your country extension and the element classification. You can create additional input values for any element, as needed.

## Input Value Options

For each input value created you can modify these attributes:

Field	Purpose
Display Sequence	Enter a number to control the display order of the entry value on element entries.
Special Purpose	Select how the input value is to be used. For example, you can indicate that it holds a percentage value, a rate, or third-party payee details. This value assists with processing the input value based on what type of information it holds.
Unit of Measure	Select the value that describes the type of value the entry value can hold, such as number or character.
Displayed	Select to display the input value on the element entry.
Allow User Entry	Select to enter values on element entries.
Required	Select to make the input value a required entry value on the element entry. If you select Required, you must also select Displayed and Allow User Entry.
Create a Database Item	Select if you want to make the values available for formulas or HCM extract.
Rate Formula	Select a rate calculation formula, for example to return a value from a user-defined table. This option only applies to the Primary input value for elements associated with rate definitions that have the Element method and a contributor type of Amount. If you select a formula, you must not select the Allow User Entry check box.
Default	Enter a value that appears as the default value for this entry value in element entries, if needed.
Apply default at runtime	Select to apply the default value when you run the payroll process, rather than when you create the element entry. This selection ensures you use the latest value on the date of the payroll run. You can manually override the default value on the element entry.
Minimum	Enter a minimum value, if needed.
Maximum	Enter a maximum value, if needed.
Validation Formula	Enter a formula that validates the entry value entered on element entries, if needed.
Validation Source	Use with the other input value options to select the valid validation method, such as lookups or formulas.
Lookup Type	Specify a lookup type to provide a list of values for an entry value. This option is available for input values of type Character only.

Field	Purpose
Warning or Error	Use when you are validating the input value or entering a minimum or maximum value. It specifies whether a warning or an error displays if the entry fails the validation condition or doesn't meet the minimum or maximum value indicated.
Reference	<p>Use to associate a balance context with the run result.</p> <p>For example, you can associate a context, such as jurisdiction, with an element. Create an input value for jurisdiction and select the jurisdiction context in the reference field. Then the run result value of the input value works as a context value when updating the balance.</p> <p>If you select a reference then the lookup type and validation source values should be automatically set to the reference context. You must provide the reference field first for the validation source value to be automatically populated.</p>
Value Set	Specify a value set to provide a dynamic list of values for an entry value. This option is available for input values of type Character only.


**⚠ Caution:** Once an element is processed, you can't update certain input value attributes, such as unit of measure. This restriction ensures that you can't change attributes that would invalidate prior results.

This table provides examples of the allowable formats, depending on the unit of measure (UOM) specified for the entry value on the Manage Elements - Element Overview, Input Values page.

Unit of Measure	Sample Entry Value	Display in Application
Character	C	Complete
Integer	12345	12,345
Number	12345.6789	12,345.6789
	0.123456789	0.123456789
Day	123	123
	0.123	0.123
Money	12345	12345.00
	-12345.67	<12345.67>
Hours in decimal format, 1 place	12345	12345.0
Hours in decimal format, 2 places	12345	12345.00
Hours in decimal format, 3 places	12345	12345.000
Hours expressed as a numeric value	12345	12345



Unit of Measure	Sample Entry Value	Display in Application
Hours and minutes expressed as numeric values	12345	12345:00
Hours, minutes, and seconds expressed as numeric values	12345	12345:00:00
Date	2016-06-21	21-Jun-2016
Time	13:05	1:05 PM

 **Note:** Display values can be derived from the meaning attribute of the view object. For example if you enter **C** as a value for the Character UOM it could display as **Complete**. Conversion to display formats is based on the profile option value and locale.

#### Related Topics

- [Element Entries: How Element Setup Affects Entries and Their Entry Values](#)
- [Using a Value Set for an Element Input Value: Worked Example](#)
- [Creating and Editing Profile Options: Procedure](#)


## Element Eligibility: Explained


Element eligibility determines which people are eligible for an element. To determine eligibility, you select the criteria that people must have to receive entries of the element.

### Eligibility Criteria

You can define element eligibility using the following criteria.

Level	Available Criteria
Payroll Relationship	Payroll Statutory Unit
	Relationship Type
Terms	Legal Employer
Assignment	Department in which the person works
	Job, for example, associate professor or secretary
	Grade
	Employment Category

Level	Available Criteria
	People Group
	<p> <b>Note:</b> You set up all the people groups that are appropriate for your enterprise. For example, you could decide to group people by company within a multi-company enterprise, and by union membership.</p>
	Location of person's office
	Position, which is a class of job performed in a particular organization, for example, associate professor of chemistry, or finance department secretary.
	Payroll
	All payrolls eligible

 **Tip:** You must define element eligibility for every element, including predefined elements. If you want the element to be available to all workers, add an eligibility name and save the element eligibility record with no additional criteria selected. This is the usual practice for compensation and benefit elements where you determine eligibility using eligibility profiles.

## Examples of Eligibility Criteria

In the following examples, you restrict who can receive an element entry:

- Your enterprise provides company cars only to people in the sales or customer support departments. You create two eligibility records, and use the Department field to specify the eligibility criteria. Select Sales Department for one record and Customer Support for the second record.
- Your enterprise offers a production bonus to people who work full-time in production and are on the weekly payroll. You create one eligibility record and select Full-time regular in the Employment Category field, Production in the Department field, and Weekly in the Payroll field.

## Multiple Rules of Eligibility

You can define more than one eligibility record for each element, but there must be no overlap between them.

For example, you can create one record for the combination of grade A and the job of accountant. However, you can't create one record for grade A and a second for the job of accountant. These rules would imply that an accountant on grade A is eligible for the same element twice.

If you have more than one element eligibility record, you can enter different default values and costing information for each eligibility group.

## Maintaining Elements: Explained

After you create and use an element, updates to the element are limited to ensure the integrity of the element for retroactive processing and the balances of the input values. You can't remove existing input values or add new ones if you have created

entries for the element. To add an input value to an element before you create any element entries, set your effective date to the element's start date.

You can make the following changes to an element that has been previously processed:


- Change a required input value to be optional.
- Alter the sequence in which input values appear in the Element Entries page.
- Change the input value validation rules for minimum, maximum, lookup, or formula.
- Change your specification of which input values create database items.
- Change the reporting name. However, the database items created for the element will continue to use the original name.

## Maintaining Element Eligibility: Explained

After saving an element eligibility record, you can only make certain changes. You can't update the eligibility criteria.

The following table summarizes the actions you can take.

Action	Result
Change the input value default values and validation	These changes affect all new entries, and updates to existing entries. Changes to run time defaults affect existing entries too.
Delete the element eligibility record	Existing recurring entries are ended automatically when you end the element's eligibility.

 **Note:** You can't delete the element eligibility record if any nonrecurring entries exist at the date you want to end the record. You must delete existing entries before you end the element's eligibility.

## Creating Payroll Elements for US Compensation: Procedure

This procedure demonstrates how to create US legislative data group (LDG) elements for salary bases as well as individual and workforce compensation plans. The typical compensation usages are:

- Recurring base pay, such as annual salaries and hourly earnings
- Recurring payments, such as an allowance
- Nonrecurring payments, such as a bonus
- Recurring voluntary deductions, such as savings plans or charitable contributions

### Task Summary

To create US LDG elements, complete the following steps using the Manage Elements task in the Compensation work area. Use the default values except where the procedure indicates otherwise.

1. Create the US LDG element.

2. Enter basic information.
3. Enter additional details for standard earnings elements, if you use Oracle Fusion Global Payroll or Payroll Interface.
4. Review selections and submit the element.
5. Set minimum and maximum amounts for supplemental earnings as well as standard earnings elements with a Regular Not Worked secondary classification.
6. Set up open eligibility.

## Creating Element

Use the Manage Elements task to complete the following steps.

1. Click the **Create** icon.
2. Select a US LDG.
3. Select the primary classification that matches the use of the payroll element. The available classifications vary based on the selected LDG. The following primary classification values are available after selecting a US LDG.

Element Use	Primary Classification
Recurring base pay, such as annual salaries and hourly earnings	Standard Earnings  For salary elements, the application posts the annual salary amount to the element entry, regardless of the salary basis frequency. To have the element entry hold the salary amount in the frequency of the salary basis, use an information element.
Recurring payments, such as an allowance	Standard Earnings
Nonrecurring payments, such as a bonus	Supplemental Earnings
Recurring voluntary deductions, such as savings plans or charitable contributions	Voluntary Deductions

4. When available, select the secondary classification that corresponds to the selected primary classification of the US LDG.

Element Use	Secondary Classification
Recurring base pay, such as annual salaries and hourly earnings	Regular
Recurring payments, such as an allowance	Regular Not Worked
Nonrecurring payments, such as a bonus	Bonus
Recurring voluntary deductions, such as savings plans or charitable contributions	Select the relevant choice. If there is none, leave it blank.

5. Click **Continue**.

## Entering Basic Information

On the Basic Information page, complete the following steps.

1. Enter a descriptive name.

Element Use	Sample Value
Recurring base pay, such as annual salaries and hourly earnings	US Annual Salary or California Hourly Wages
Recurring payments, such as an allowance	Gym Allowance or Car Allowance
Nonrecurring payments, such as a bonus	Quarterly Sales Award or Performance Award
Recurring voluntary deductions, such as savings plans or charitable contributions	Red Cross Contribution

2. Complete the following basic information fields, as shown in this table.

Field	Value
<b>Reporting Name</b>	Enter the name that you want to display on reports, including payslip, for this earnings or deduction payroll element.  Reporting names must be unique for elements you add to compensation history.
<b>Effective Date</b>	1/1/1951  Enter an early date so that the element is available for use immediately in your salary bases and individual and workforce compensation plans.
<b>What is the earliest entry date for this element?</b>	First Standard Earning Date
<b>What is the latest entry date for this element?</b>	This date determines how element entries process after a person is terminated or transferred to another payroll. Select the value that fits your business process.
<b>At which employment level should this element be attached?</b>	For salary elements, match the employment level to the level at which the legal employer holds worker salaries.

3. Specify whether this element recurs each payroll period or requires explicit entry.

Element Use	Value
Recurring base pay, such as annual salaries and hourly earnings	Recurring (default)

Element Use	Value
Recurring payments, such as an allowance	Recurring (default)
Nonrecurring payments, such as a bonus	Nonrecurring
Recurring voluntary deductions, such as savings plans or charitable contributions	Recurring (default)

4. To accept the remaining default values, click **Next**.

## Entering Additional Details

You must configure the calculation rules. Typically, you accept the default values for special and FSLA rules.

1. Select the calculation rule.

Element Use	Value
Recurring base pay, such as annual salaries and hourly earnings	Flat amount
Recurring payments, such as an allowance	Flat amount
Nonrecurring payments, such as a bonus	Flat amount
Recurring voluntary deductions, such as savings plans or charitable contributions	Flat amount or Percentage of Earnings

2. Select the default periodicity, which is the frequency in which the application stores the amount.

Element Use	Value
Recurring base pay, such as annual salaries and hourly earnings	<p>The value should be the same as the salary basis frequency, such as:</p> <ul style="list-style-type: none"> <li>○ Hourly</li> <li>○ Weekly</li> <li>○ Semimonthly</li> <li>○ Monthly</li> <li>○ Semiannually</li> <li>○ Annually</li> </ul>
Recurring payments, such as an allowance	The typical value is monthly.

Element Use	Value
Nonrecurring payments, such as a bonus	<p>Typical values are:</p> <ul style="list-style-type: none"> <li>Quarterly</li> <li>Annually</li> <li>Periodically</li> </ul>
Recurring voluntary deductions, such as savings plans or charitable contributions	Typically the same periodicity as base pay, such as Annually or Monthly

### 3. Select the conversion rule for the element.

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

Conversion Rule	Calculation	Example
		The calculation then divides the annual amount by the number of days or hours in that week based on the work schedule.

4. Accept the default values for the remaining rules by clicking **Next**. If you use Global Payroll or Payroll Interface, configure additional details for base pay elements, such as proration and retroactive changes.

## Reviewing and Submitting

Review all items to ensure everything is correct and then click **Submit**.

## Setting Minimum and Maximum Amounts

For individual compensation plans, complete these optional steps for supplemental earnings elements as well as standard earnings elements with a Regular Not Worked secondary classification.

1. In the Element Overview section, select **Amount**.
2. On the Input Values section Edit menu, select **Correct**.
3. In the Default Entry Values and Validation section, enter a minimum or maximum value, or both.
4. Select **Warning** or **Error**, as appropriate.

Value	Usage
Warning	Display a message to users when they enter an amount that is less than the minimum value or greater than the maximum value, if set. They can continue with their submissions.
Error	Display a message to users when they enter an amount that is less than the minimum value or greater than the maximum value, if set. This prevents them from continuing until the amount is within the specified limits.

## Setting Up Open Eligibility

Set up the element for eligibility without any criteria. Compensation determines salary and compensation plan eligibility as described in the following table.

Object	Eligibility Determination
Base pay earnings elements	Salary basis assigned to the worker determines the eligibility
Individual and workforce compensation plans	Eligibility profiles assigned to the plans and options in plans determines the eligibility for payroll elements

1. In the Elements Overview section, select **Element Eligibility**.
2. On the Actions menu, select **Create Element Eligibility**.
3. In the Element Eligibility, General Information section **Element Eligibility Name** field, enter the element name with the suffix Open.

For example, for the payroll element Spot Bonus, the element eligibility name would be Spot Bonus Open.



4. Click **Submit**.
5. Click **Done**.

#### *Related Topics*

- [Element Classification Components: How They Work Together](#)
- [Elements: How They Hold Payroll Information for Multiple Features](#)
- [Periodicity Conversion: Explained](#)

## Determining an Element's Latest Entry Date: Critical Choices


An element's latest entry date determines how element entries process after a person is terminated or transferred to another payroll. The options include: final close, last standard earning date, and last standard process date. These are the predefined options. You can create others that fit your business needs.

### Final Close

This option enables the element to stay open for entries beyond a person's last day worked. For example, you may want the element to stay open to pay a severance package.

### Last Standard Earning Date

This option stops all element entries on the date the person leaves. You should use this option for recurring entries such as salary.

 **Tip:** If you select the last standard earning date option, also select proration for the element. This ensures that the element is processed up to this date, even if it isn't active at the end of a payroll period.

### Last Standard Process Date

The value for last standard process date is automatically set to the last day of the pay period in which the person is terminated. You can, however, set it to a later period when you terminate a person. It stops all element entries on the last standard process date or on the date the assignment ends, if this is earlier.

#### *Related Topics*

- [Element Entries: How Element Setup Affects Entries and Their Entry Values](#)

## Element Duration Dates in Payroll Relationships: Explained

Element duration dates control when element entries for an employee start or end. View and manage these dates on the Manage Payroll Relationships page in the Payroll Calculation work area when you hire, terminate, add, or transfer an employee's payroll. This topic explains the predefined dates, how and when they're populated, and how they affect payroll processing.


In addition to the following predefined element duration dates, you may have additional dates that were created as time definitions at your site. Predefined element duration dates include:

- First standard earnings date
- Last standard earnings date
- Last standard process date
- Final close date

Element entries end on one of the last standard dates or the final close date, depending on the element setup.

## Element Duration Dates on the Manage Payroll Relationships Page

You may see multiple sections displaying element duration dates on the Manage Payroll Relationships page. Each section is for a different level of the employment hierarchy: payroll relationship, employment terms, and assignment. In the Assignment section, the first Element Duration Dates section shows the dates associated with the assigned payroll. The second section shows dates associated with the assignment itself. Information in this section overrides information in the section for the assigned payroll.

 **Note:** You can change element duration dates at the assignment, terms, or assigned payroll levels, not at the payroll relationship level.

## Initial Date Values

The following table provides information about what actions set the date values and which dates they're based on.

Date	Description	Actions Setting Dates	Date Used
First Standard Earnings Date	Date when standard earnings start accumulating	Hire, add payroll, or transfer payroll	Hire date or the effective date of the change
Last Standard Earnings Date	Date when standard earnings stop accumulating	End employee assignment or terms, or transfer payroll	Termination date. For transfer, last day of the payroll period or one day before transfer date.
Last Standard Process Date	Last date that at regular payroll process can include elements for normal processing	End employee assignment or terms, or transfer payroll	Last day of the payroll period
Final Close Date	Last date that a supplemental payroll process can include element entries	None, but you can manually set to limit the length of time that element entries are open for processing, such as the date on which processes skip terminated assignments	End of time unless manually set  The End Payroll action does not set a final close date. You must set the final close date to end a payroll record.

## Changing Date Values

The following table shows the dates you can change.

Date Field	Set Automatically	Editable
First Standard Earnings Date	x	
Last Standard Earnings Date	x	
Last Standard Process Date	x	x
Final Close Date		x
User-defined Time Definition		x

### Related Topics

- [Setting End Dates for Terminations: Examples](#)
- [Terminations: How They Affect Payroll Processing](#)
- [Using Time Definitions for Severance Pay: Example](#)

## Default Values for Element Entries: Critical Choices

You specify default values for element entries using the Manage Elements task in the Payroll Calculation work area. Your element setup controls when the default value affects element entries. You can apply the default value only when an element entry is created, or you can apply the latest default value at run time. Another option is to use a formula to provide default values on one or more entry values.

You can:

- Set a default value for an input value, or select a defaulting formula for the element.
- Override the default value or formula for a specific group of employees identified by an element eligibility record.
- Override the default value for specific employees on their element entries.

### Defining Elements to Provide Default Values at Element Entry Creation

When you create or edit input values, you can specify a default value. If you don't select the **Apply default at run time** option, then subsequent updates to the default value have no effect on existing element entries. Users can override or change the default value at any time.

### Defining Elements to Provide Default Values at Run Time

To use this method, enter the default value and select the **Apply default at run time** option for the input value. If the element entry value is left blank, the payroll process uses the current default value from the element or element eligibility record. If you

enter a value in the element entry value, the manual entry overrides the default value and updates to the default value don't affect that entry. You can clear the entry if you want to restore the default value.

## Using a Formula to Provide Default Values

You can create a formula of type element input validation to provide default values for one or more entry values. Select this formula in the Defaulting Formula field for an element or element eligibility record. The order of precedence is as follows:

- A formula at the element eligibility level overrides a formula at the element level.
- If you enter a default value for the input value and select a defaulting formula, the formula overrides the default value.

### *Related Topics*

- [Element Entries: How Element Setup Affects Entries and Their Entry Values](#)
- [Element Input Validation Formula Type](#)

## FAQs

### What's the difference between a recurring and nonrecurring element?

A recurring element has an entry that applies in every pay period until the entry is ended.


A nonrecurring element has an entry that applies in one pay period only. It's only processed once per pay period. The payroll to which the person is assigned determines the dates of the pay period.

 **Note:** A base pay element associated with a salary basis must be recurring.

# 5 Fast Formulas

## Using Formulas: Explained

Fast formulas are generic expressions of calculations or comparisons that you want to repeat with different input variables. Each formula usage summarized in this topic corresponds to one or more formula types, requiring specific formula inputs and outputs. You can use the Manage Fast Formulas task in the Setup and Maintenance work area, or work areas relevant to the formula type, such as Payroll Calculation.

 **Note:** Requirements for specific formula inputs and outputs are explained in separate chapters of the Oracle Global HR Cloud: Using Fast Formula guide.

## Calculate Payrolls

You can write payroll calculations and skip rules for elements to represent earnings and deductions.

With fast formulas you can:

- Associate more than one payroll formula with each element to perform different processing for employee assignments with different statuses.
- Define elements and formulas for earnings and deductions with highly complex calculations requiring multiple calls to the database.
- Associate a skip rule formula with an element to define the circumstances in which it's processed.
- Customize the predefined proration formula to control how payroll runs prorate element entries when they encounter an event, such as a mid-period change in an element entry value.

## Define Custom Calculations for Benefits Administration

You can use formulas to structure your benefit plans. Formulas provide a flexible alternative to the delivered business rules. Use formulas to configure:

- Date calculations, such as enrollment start and end dates, rate or coverage start and end dates, waiting periods and enrollment periods, or action item due dates
- Calculations of rate and coverage amount, minimum and maximum, or upper and lower limits
- Certification requirements
- Partial month and proration calculations
- Eligibility and participation evaluation

For example, you can write a formula to calculate benefits eligibility for those cases where the provided eligibility criterion does not accommodate your particular requirements.

 **Note:** For more information, see Benefits Fast Formula Reference Guide (1456985.1) on My Oracle Support at <https://support.oracle.com>.

## Validate Element Inputs or User-Defined Tables

Use lookups or maximum and minimum values to validate user entries.

For more complex validations you can write a formula to check the entry. You can also use a formula to validate entries in user tables.

## Edit the Rules for Populating Work Relationship or Payroll Relationship Groups

You can define criteria to dynamically populate a payroll relationship group or work relationship group.

When you create a payroll relationship group or work relationship group formula type, you can choose to use an expression editor or a text editor. The expression editor makes it easy to build criteria to define the group. For more complex conditions, such as validations, you can select the text editor.

## Define Custom Configuration for Compensation

To extend the existing flexibility of compensation plan configuration write formulas to customize:

- Start and end dates for compensation allocations under individual compensation plans
- Person selection, hierarchy determination, column default values, and currency selection for workforce compensation plans
- The source of items displayed in total compensation statements

## Define Formulas to Create Rule Templates for Time and Labor


Use formulas with time repository rule templates to create rules. The formulas contain delivered combinations of rule parameters and output results. You can use one formula with multiple rule templates by varying the template configuration.

When creating a rule template, you select a formula name and then configure the parameter type and display name of the parameters and variables. You don't have to work with the entire formula statement to determine which details to change to achieve a particular outcome.

Use formulas in Time and Labor to utilize:

- Logic for processing or calculating time
- Parameters that enable rules to pass values to the formula for use in calculations
- Output variables that the formula uses to return calculation results to the rules

For example, the Period Maximum Hours Template uses the WFM\_PERIOD\_MAXIMUM\_TIME\_ENTRY\_RULE formula to compare reported time category hours to defined maximum hours.

 **Note:** For more information, see Time and Labor Fast Formula Reference Guide (1990057.1) on My Oracle Support at <https://support.oracle.com>.

## Compensation Currency Selection Formula Type

The Compensation Currency Selection formula determines the currency associated with a workforce compensation component. You select the formula on the Configure Compensation Components page.

### Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED
- EFFECTIVE\_DATE
- END\_DATE
- START\_DATE
- HR\_ASSIGNMENT\_ID
- HR\_TERM\_ID
- JOB\_ID
- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE
- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID
- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

### Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

### Input Variables

The following input variables are available to formulas of this type.

Input	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_COMPONENT_ID	Number	Y	Component ID
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date

Input	Data Type	Required	Description
CMP_IV_PLAN_END_DATE	Date	Y	Plan End Date
CMP_IV_PLAN_EXTRACTION_DATE	Date	Y	Plan Extraction Date
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date
CMP_IV_PERFORMANCE_EFF_DATE	Date	Y	Performance Effective Date
CMP_IV_PROMOTION_EFF_DATE	Date	Y	Promotion Effective Date
CMP_IV_XCHG_RATE_DATE	Date	Y	Currency Conversion Date
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERSON_ID	Number	Y	Worker ID

## Return Values

The following return variables are available to formulas of this type.

Return Value	Data Type	Required	Description
L_CURR_CODE	Char	N	Currency code from the formula

## Sample Formula

This sample formula determines the currency for a plan based on the component ID.

```

/*****
FORMULA NAME : Compensation Currency Selection Formula
FORMULA TYPE : Compensation Currency Selection
DESCRIPTION: It returns the currency code based on component_id.
*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number),
CMP_IV_COMPONENT_ID (number)
/*===== INPUT VALUES DEFAULTS ENDS=====*/

/*===== FORMULA SECTION BEGIN =====*/
DEFAULT FOR CMP_IV_COMPONENT_ID IS 0
l_curr_code = 'XXX'
IF (CMP_IV_COMPONENT_ID = 489) THEN
(
l_curr_code = 'USD'
)
ELSE IF (CMP_IV_COMPONENT_ID = 490) THEN
(
l_curr_code = 'GBP'
)

```



```
)  
RETURN l_curr_code  
/*===== FORMULA SECTION END =====*/
```

## Compensation Default and Override Formula Type

The Compensation Default and Override formula determines the default values populated in a column for a workforce compensation plan. When you configure the worksheet display for a column in the Configure Column Properties dialog box, Default Values tab, you can select this formula.

The following predefined formulas are available for the eligible salary column for this formula type.

**▲ Caution:** Use these formulas as samples for testing purposes only. Copy and create your own version of a formula for use in your own compensation plans. Modifying the sample formula might provide unexpected results upon upgrade.

Formula	Description
CMP_ELIGIBLE_SALARY_ PRORATION_DAILY_AVERAGE	Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period.
CMP_ELIGIBLE_SALARY_ PRORATION_MONTH_ END_AVERAGE	Eligible salary calculated by averaging salary on the last day of each month in the workforce compensation cycle evaluation period. Uses salary on the last day of the evaluation period for midmonth evaluation end dates.
CMP_ELIGIBLE_SALARY_ PRORATION_DAILY_AVERAGE_ NINETY_DAY_MIN	Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period. Returns zero for workers who worked fewer than 90 days.
CMP_ELIGIBLE_SALARY_ PRORATION_DAILY_AVERAGE_ USING_FTE	Eligible salary calculated by averaging daily salary adjusted for part-time workers. Accounts for number days that a salary is in effect and FTE during the workforce compensation cycle evaluation period.
CMP_ELIGIBLE_SALARY_ PRORATION_DAILY_AVERAGE_ FOR_JOBS	Eligible salary calculated by averaging salary for the number of days a worker holds a specific job code on the assignment. Accounts for the number of days that a salary is in effect during the workforce compensation cycle evaluation period.

## Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED
- EFFECTIVE\_DATE
- END\_DATE
- START\_DATE
- HR\_ASSIGNMENT\_ID
- HR\_TERM\_ID
- JOB\_ID

- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE
- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID
- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

## Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

## Input Variables

The following input variables are available to formulas of this type.

Input	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Unique numeric identifier for the workforce compensation plan
CMP_IV_PERIOD_ID	Number	Y	Unique numeric identifier for the fiscal calendar period
CMP_IV_COMPONENT_ID	Number	Y	Unique numeric identifier for the workforce compensation plan component
CMP_IV_ITEM_NAME	Char	Y	Name for the workforce compensation plan item
CMP_IV_PERSON_ID	Number	Y	Unique numeric identifier for the worker associated with the workforce compensation plan
CMP_IV_PLAN_START_DATE	Date	Y	Date on which the workforce compensation plan becomes active
CMP_IV_PLAN_END_DATE	Date	Y	Date on which the workforce compensation plan becomes inactive
CMP_IV_PLAN_ELIG_DATE	Date	Y	Date on which the workforce compensation plan becomes eligible
CMP_IV_PERFORMANCE_EFFECT_DATE	Date	Y	Date to use for compensation performance ratings

Input	Data Type	Required	Description
CMP_IV_PROMOTION_ EFF_DATE	Date	Y	Date on which job, grade, and position changes take effect
CMP_IV_XCHG_RATE_DATE	Date	Y	Date on which the application obtains conversion rates from the GL daily rates table
CMP_IV_ASSIGNMENT_ID	Number	Y	Date to use for assignments

## Return Values

The following return variables are available to formulas of this type.

Return Value	Data Type	Required	Description
L_DEFAULT_VALUE	Number/ Char/Date	Y	Default value from the formula. The date should be in yyyy/mm/dd format
L_DATA_TYPE	Char	Y	Data type of the column

## Sample Formula

This sample formula determines the value of a column based on its item name.

```

/*****
FORMULA NAME : Compensation Default and Override Formula
FORMULA TYPE : Compensation Default and Override
DESCRIPTION : Defaults the value of a column based on its item_name
*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number), CMP_IV_COMPONENT_ID (number),
           CMP_IV_ITEM_NAME (text)
/*===== INPUT VALUES DEFAULTS ENDS=====*/

/*===== FORMULA SECTION BEGIN =====*/

DEFAULT FOR CMP_IV_ITEM_NAME IS 'YYYYYYY'
L_DEFAULT_VALUE = to_char(0)
IF (CMP_IV_ITEM_NAME = 'AmountComp1') THEN
(
L_DEFAULT_VALUE = to_char(3333)
)
ELSE IF (CMP_IV_ITEM_NAME = 'AmountComp2') THEN
(
L_DEFAULT_VALUE = to_char(7777)
)
ELSE
(
L_DEFAULT_VALUE = to_char(-999)
)
RETURN L_DEFAULT_VALUE

```

/\*===== FORMULA SECTION END =====\*/

## Compensation Hierarchy Determination Formula Type

The Compensation Hierarchy Determination formula determines the hierarchy for an associated workforce compensation plan. You select the formula on the Configure Plan Details page.

### Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED
- EFFECTIVE\_DATE
- HR\_ASSIGNMENT\_ID
- END\_DATE
- START\_DATE
- HR\_TERM\_ID
- JOB\_ID
- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE
- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID
- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

### Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

### Input Variables

The following input variables are available to formulas of this type.

Input	Data Type	Required	Description
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_COMPONENT_ID	Number	Y	Component ID

Input	Data Type	Required	Description
CMP_IV_PERSON_ID	Number	Y	Worker ID
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End Date
CMP_IV_PLAN_EXTRACTION_DATE	Date	Y	Plan Extraction Date
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date
CMP_IV_PERFORMANCE_EFF_DATE	Date	Y	Performance Effective Date
CMP_IV_PROMOTION_EFF_DATE	Date	Y	Promotion Effective Date
CMP_IV_XCHG_RATE_DATE	Date	Y	Currency Conversion Date

## Return Values

The following return variables are available to formulas of this type.

Return Value	Data Type	Required	Description
L_PERSON_ID	Number	Y	Person ID of manager
L_ASSIGNMENT_ID	Number	Y	Assignment ID of manager

Or

Return Value	Data Type	Required	Description
L_PERSON_NUMBER	Number	Y	Person number of manager

You receive the following error if the formula returns an invalid PERSON\_NUMBER and the application can't obtain the ASSIGNMENT\_ID:

Formula passed in an invalid person number <15465857>. Assignment ID could not be obtained.

## Sample Formula

This sample formula determines the manager of a person when the assignment\_id is passed.

```

/*****
FORMULA NAME : Compensation Hierarchy Determination Formula

```

```

FORMULA TYPE : Compensation Hierarchy Determination
DESCRIPTION: Hierarchy determination fast formula which is based on assignment_id
*****

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number)/*=====
INPUT VALUES DEFAULTS ENDS=====*/

/*===== FORMULA SECTION BEGIN =====*/
DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0
L_PERSON_ID = '0' L_ASSIGNMENT_ID = '0'
if (CMP_IV_ASSIGNMENT_ID = 100000008154060 ) THEN
(
L_PERSON_ID = to_char(-999) //-999 indicates top level
//Manager.
L_ASSIGNMENT_ID = to_char(-999)
)
ELSE
(
L_PERSON_ID = to_char(100000008153756)
L_ASSIGNMENT_ID = to_char(100000008154060)
)

RETURN L_PERSON_ID , L_ASSIGNMENT_ID

/*===== FORMULA SECTION END =====*/

```

## Compensation Person Selection Formula Type

The Compensation Person Selection formula determines the person selected for an associated workforce compensation plan. You select the formula when you run the Start Workforce Compensation Cycle process.

### Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED
- EFFECTIVE\_DATE
- END\_DATE
- START\_DATE
- HR\_ASSIGNMENT\_ID
- HR\_TERM\_ID
- JOB\_ID
- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE
- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID
- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

## Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

## Input Variables

The following input variables are available to formulas of this type.

Input	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End Date
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date
CMP_IV_PERFORMANCE_ EFF_DATE	Date	Y	Performance Effective Date
CMP_IV_PROMOTION_ EFF_DATE	Date	Y	Promotion Effective Date
CMP_IV_XCHG_RATE_DATE	Date	Y	Currency Conversion Date
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERSON_ID	Number	Y	Worker ID

## Return Values

The following return variables are available to formulas of this type.

Return Value	Data Type	Required	Description
L_SELECTED	Char	N	Y or N

## Sample Formula

This sample formula determines if a person is selected for a workforce compensation plan based on their assignment\_id.

```
/******  
FORMULA NAME : Compensation Selection Formula  
FORMULA TYPE : Compensation Person Selection  
DESCRIPTION: Assignment_id based selection fast formula
```

```

*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number)
/*===== INPUT VALUES DEFAULTS ENDS=====*/

/*===== FORMULA SECTION BEGIN =====*/
DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0
l_selected = 'Y'
/* 100000008154095 - Ariel.Aimar@oracle.com - GBI data*/
if (CMP_IV_ASSIGNMENT_ID = 100000008154095) THEN
(
l_selected = 'N'
)
else
(
l_selected = 'Y'
)
RETURN l_selected
/*===== FORMULA SECTION END =====*/

```

## Compensation Default Access Level Formula Type

The Compensation Default Access Level formula determines the access level for the selected workforce compensation plan hierarchy. You select the formula on the Configure Hierarchies page.

### Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED
- EFFECTIVE\_DATE
- END\_DATE
- START\_DATE
- HR\_ASSIGNMENT\_ID
- HR\_TERM\_ID
- JOB\_ID
- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE
- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID
- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

### Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.



## Input Variables

The following input variables are available to formulas of this type.

Input	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_PLAN_EXTRACTION_DATE	Date	Y	Plan Extraction Date
CMP_IV_HIERARCHY_TYPE	Char	Y	Hierarchy Type
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End Date
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date
CMP_IV_PERFORMANCE_EFFECT_DATE	Date	Y	Performance Effective Date
CMP_IV_PROMOTION_EFFECT_DATE	Date	Y	Promotion Effective Date
CMP_IV_XCHG_RATE_DATE	Date	Y	Currency Conversion Date
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERSON_ID	Number	Y	Worker ID

## Return Values

The following return variables are available to formulas of this type.

Return Value	Data Type	Required	Description
UPDATABLE	Char	Y	Updatable
READONLY	Char	Y	Read-only
NOACCESS	Char	Y	No Access

## Sample Formula

This sample formula determines if a person is selected for a workforce compensation plan based on their assignment\_id.

```

/*****
FORMULA NAME : Compensation Default Access Level
FORMULA TYPE : Compensation Default Access Level
DESCRIPTION : Assignment_id based selection fast formula
*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number)
/*===== INPUT VALUES DEFAULTS ENDS=====*/

/*===== FORMULA SECTION BEGIN =====*/

DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0

l_selected = 'Y'

/* 100000008154095 - Ariel.Aimar@oracle.com - GBI data*/

if (CMP_IV_ASSIGNMENT_ID = 100000008154095) THEN
(
l_selected = 'NOACCESS'
)
else
(
l_selected = 'UPDATABLE'
)

RETURN l_selected
/*===== FORMULA SECTION END =====*/

```

### Related Topics

- [Default and Override Formula Test Results: Explained](#)

## Total Compensation Item Formula Type

The Total Compensation Item formula determines compensation information that isn't stored in the other predefined item source types. You select the formula when you manage compensation items on the Create or Edit Compensation Items page.

### Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED
- EFFECTIVE\_DATE
- END\_DATE
- START\_DATE
- HR\_ASSIGNMENT\_ID
- HR\_TERM\_ID

- JOB\_ID
- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE
- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID
- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

## Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

## Input Variables

The following input variables are available to formula of this type.

Input Value	Data Type	Required	Description
CMP_IV_PERIOD_ID	Char	Y	Period ID
CMP_IV_PERIOD_START_DATE	Date	Y	Statement Period Start Date
CMP_IV_PERIOD_END_DATE	Date	Y	Statement Period End Date

## Return Values

The following return variables are available to formula of this type.

Return Value	Data Type	Required	Description
COMPENSATION_DATES	Date	Y	One to 15 transaction dates delimited by semicolon, maximum 250 characters.
VALUES	Char	Y	One to 15 transaction values delimited by semicolon, maximum 250 characters. Must be the same number of values as dates.
ASSIGNMENTS	Char	N	One to 15 transaction assignments delimited by semicolon, maximum 250 characters. Must be the same number of assignments as dates. Can return an empty space with a delimiter (; ;).

Return Value	Data Type	Required	Description
LEGALEMPLOYERS	Char	N	One to 15 legal employer IDs delimited by semicolon, maximum 250 characters. Must be the same number of assignments as dates. Can return an empty space with a delimiter (; ;).
COMPENSATION_ DATES1	Date	Y	Second variable for transaction dates from 16 to 30 if limit of 250 characters is exceeded.
VALUES1	Char	Y	Second variable for transaction values from 16 to 30 if limit of 250 characters is exceeded.
ASSIGNMENTS1	Char	N	Second variable for transaction assignments from 16 to 30 if limit of 250 characters is exceeded.
LEGALEMPLOYERS1	Char	N	Second variable for legal employer IDs from 16 to 30 if limit of 250 characters is exceeded.
COMPENSATION_ DATES2	Date	Y	Transaction dates from 31 to 45.
VALUES2	Char	Y	Transaction values from 31 to 45.
ASSIGNMENTS2	Char	N	Transaction assignments from 31 to 45.
LEGALEMPLOYERS2	Char	N	Legal employers from 31 to 45.
COMPENSATION_ DATES3	Dates	Y	Transaction dates from 46 to 60.
VALUES3	Char	Y	Transaction values from 46 to 60.
ASSIGNMENTS3	Char	N	Transaction assignments from 46 to 60.
LEGALEMPLOYERS3	Char	N	Legal employers from 46 to 60.

## Sample Formula

This sample formula returns one date and one value based on the worker ID.

```

/*****
FORMULA NAME : Total Compensation Simple Item Formula

```

```

FORMULA TYPE : Total Compensation Item
DESCRIPTION : Returns one date and one value.
*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_PERSON_ID (text), CMP_IV_PERIOD_START_DATE (date), CMP_IV_PERIOD_END_DATE (date)
DEFAULT FOR CMP_IV_PERSON_ID IS '-1'
DEFAULT FOR CMP_IV_PERIOD_START_DATE IS '4712/12/31' (date)
DEFAULT FOR CMP_IV_PERIOD_END_DATE IS '4712/12/31' (date)
/*===== INPUT VALUES DEFAULTS ENDS =====*/

/*===== FORMULA SECTION BEGIN =====*/
COMPENSATION_DATES = '2005/01/01'
VALUES = '500.00'

RETURN COMPENSATION_DATES, VALUES

/*===== FORMULA SECTION END =====*/

```

This sample formula returns multiple variables.

```

/*****
FORMULA NAME : Total Compensation Multi Item Formula
FORMULA TYPE : Total Compensation Item
DESCRIPTION : Returns multiple variables.
*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_PERSON_ID (text), CMP_IV_PERIOD_START_DATE (date) , CMP_IV_PERIOD_END_DATE (date)
/*===== INPUT VALUES DEFAULTS ENDS =====*/

/*===== FORMULA SECTION BEGIN =====*/

COMPENSATION_DATES = '2009/01/01;2009/02/01;2009/03/01'
COMPENSATION_DATES1 = '2009/07/01;2009/08/01;2009/09/01'
COMPENSATION_DATES2 = '2009/10/01;2009/11/01;2009/12/01'
COMPENSATION_DATES3 = '2009/10/01;2009/11/01;2009/12/01'

VALUES = '200.00;200.00;300.00'
VALUES1 = '300.00;500.00;500.00'
VALUES2 = '500.00;500.00;600.00'
VALUES3 = '600.00;600.00;700.00'

/* Returns only first two assignment */
ASSIGNMENTS = ';1234567890;1234567890'
ASSIGNMENTS1 = '1234567890;1234567890;1234567890'

/* Returns last two assignments */
ASSIGNMENTS2 = ';1234567890;1234567890'
/* Returns first and last assignments */
ASSIGNMENTS3 = '1234567890;;1234567890'

LEGALEMPLOYERS = '0123456789;;0123456789'
LEGALEMPLOYERS1 = '0123456789;0123456789;0123456789'
LEGALEMPLOYERS2 = '0123456789;0123456789;0123456789'
LEGALEMPLOYERS3 = '0123456789;0123456789'

RETURN
COMPENSATION_DATES,VALUES,COMPENSATION_DATES1,VALUES1,COMPENSATION_DATES2,VALUES2,COMPENSATION_DATES3,VALUES3,ASSIG
GALEMPLOYERS,LEGALEMPLOYERS1,LEGALEMPLOYERS2,LEGALEMPLOYERS3

/*===== FORMULA SECTION END =====*/

```

## Writing a Fast Formula Using Formula Text: Worked Example

This example demonstrates how to create a fast formula using the text editor to return the range of scheduled hours for managers and a different range for other workers.

Before you create your formula, you may want to determine the following:

Decisions to Consider	In This Example
Is the formula for a specific legislative data group?	No, this is a global formula that can be used by any legislative data group.
What is the formula type for this formula?	Range of Scheduled Hours
Are there any contexts used in this formula?	No
Are there any database item defaults?	Yes, ASG_JOB
Are there any input value defaults?	No
What are the return values?	MIN_HOURS, MAX_HOURS, FREQUENCY

## Creating a Fast Formula Using the Text Editor to Determine a Manager's Scheduled Hours

1. On the Overview page in the Setup and Maintenance work area, search for the Manage Fast Formulas Task.
2. Click **Go to Task**.
3. On the Manage Fast Formula page, click the **Create** icon to create a new formula.
4. On the Create Fast Formula page, complete the fields as shown in this table.

Field	Value
Formula Name	Manager Range of Scheduled Hours
Formula Type	Range of Scheduled Hours
Description	Manager's Range of Hours
Effective Start Date	1-Jan-2010

5. Click **Continue**.

6. Enter the following formula details in the Formula Text section:

```
/* DATABASE ITEM DEFAULTS BEGIN */
DEFAULT FOR asg_job IS ' '
/* DATABASE ITEM DEFAULTS END */
JOB_1 = ASG_JOB
IF JOB_1 = 'Manager' then
(MIN_HOURS = 25
MAX_HOURS = 40
FREQUENCY = 'H')
else
(MIN_HOURS = 20
MAX_HOURS = 35
FREQUENCY = 'H')
return MIN_HOURS, MAX_HOURS, FREQUENCY
```

7. Click **Compile**.

8. Click **Save**.

#### Related Topics

- [Using Formula Components: Explained](#)
- [Formula Operators: Explained](#)

## Formula Compilation Errors: Explained

Compilation errors display in the Manage Fast Formulas page after you compile the formula. The compiler aborts the compilation process when it encounters an error. Error messages display the line number and type of error encountered.

### Common Compilation Errors

This table lists the type and description of several common formula compilation errors.

Formula Error	Description
Syntax Error	The formula text violates the grammatical rules for the formula language. An example is using IF1 instead of IF for an IF statement.
Incorrect Statement Order	ALIAS, DEFAULT, or INPUT statements come after other statements.
Misuse of ASSIGNMENT Statement	Occurs when any of these conditions exist: <ul style="list-style-type: none"> <li>• An <b>ASSIGNMENT</b> assigns a value to a database item.</li> <li>• A context is assigned a value externally to a <b>CHANGE_CONTEXTS</b> statement.</li> <li>• The formula assigns a value to a non-context variable within a <b>CHANGE_CONTEXTS</b> statement.</li> </ul> <p>CHANGE_CONTEXTS statements can be used in a formula.</p>
Misuse of ALIAS Statement	You can only use an ALIAS statement for a database item.
Missing DEFAULT Statement	A database item that specifies defaulting must have a DEFAULT statement.

Formula Error	Description
Misuse of DEFAULT Statement	A DEFAULT statement is specified for a variable other than an input or database item.
Uninitialized Variable	The compiler detects that a variable is uninitialized when used. The compiler can't do this in all cases. This error often occurs when the formula includes a database item that requires contexts that the formula type doesn't support. The formula treats the database item as a local variable. For example, balance database items require the PAYROLL_REL_ACTION_ID PAYROLL_ASSIGNMENT_ID and CALC_BREAKDOWN_ID contexts. Generally you can only use them in formulas of type Oracle Payroll.
Missing Function Call	The compiler does not recognize a function call. The combination of return type, function name, and parameter types does not match any available function.
Incorrect Operator Usage	An instance of a formula operator use doesn't match the permitted uses of that operator.  For example, the + operator has two permitted uses. The operands are both of data type NUMBER, or both of data type TEXT.
Inconsistent Data Type Usage	The formula uses a formula variable of more than one data type. Or the formula uses a database item or context with the wrong data type.  For example, Variable A is assigned a NUMBER value at the start of the formula, but is assigned a TEXT value later in the formula.
EXIT Statement Not Within WHILE Loop	A condition that eventually becomes false or an EXIT call for exiting the loop doesn't exist.
Misuse of Context	The formula uses a variable as a context, or a context as a variable.  For example, a formula assigns a value to AREA1 as an ordinary variable, but later uses AREA1 as a context in a GET_CONTEXT call.

## Formula Execution Errors: Explained


Fast formula execution errors occur when a problem arises while a formula is running. The usual cause is a data problem, either in the formula or in the application database.

### Formula Execution Errors

This table lists the type and description of each formula execution error.

Formula Error	Description
Uninitialized Variable	Where the formula compiler can't fully determine if a variable or context is initialized, it generates code to test if the variable is initialized.  When the formula executes, this code displays an error if the variable or context isn't initialized.
Divide by Zero	Raised when a numeric value is divided by zero.



Formula Error	Description
No Data Found	<p>Raised when a non-array type database item unexpectedly fails to return any data. If the database item can't return data, then it should provide a default value.</p> <p>You can do this by creating a default statement. An error in formula function code can also cause this error message.</p>
Too Many Rows	<p>Raised when a non-array type database item unexpectedly returns more than a single row of data. The cause is an incorrect assumption made about how the data is being accessed.</p> <p>An error in the formula function code can also cause this error message.</p>
NULL Data Found	<p>Raised when a database item unexpectedly returns a NULL data value. If the database item can return a NULL value, then it provides a default value.</p> <p> <b>Note:</b> Some database items can't return a NULL value. If it can, then you can provide a default value for that database item.</p>
Value Exceeded Allowable Range	Raised for a variety of reasons, such as exceeding the maximum allowable length of a string.
Invalid Number	Raised when a formula attempts to convert a non numeric string to a number.
User Defined Function Error	Raised from within a formula function. The error message text is provided as part of the formula error message.
External Function Call Error	A formula function returned an error, but didn't provide any additional information to the formula code. The function might have sent error information to the logging destination for the executing code.
Function Returned NULL Value	A formula function returned a NULL value.
Too Many Iterations	A single WHILE loop, or a combination of WHILE loops, has exceeded the maximum number of permitted iterations. The error is raised to terminate loops that can never end. This indicates a programming error within the formula.
Array Data Value Not Set	The formula attempted to access an array index that has no data value. This error occurs in the formula code.
Invalid Type Parameter for WSA_EXISTS	An invalid data type was specified in the WSA_EXISTS call.
Incorrect Data Type For Stored Item	When retrieving an item using WSA_GET, the actual data type doesn't match that of the stored item. This error occurs within the calling formula.
Called Formula Not Found	The called formula couldn't be resolved when attempting to call a formula from a formula. This issue could be due to an error in the calling formula, or because of installation issues.
Recursive Formula Call	An attempt was made to call a formula from itself. The call could be made directly or indirectly from another called formula. Recursive formula calling isn't permitted.

Formula Error	Description
Input Has Different Types In Called and Calling Formulas	When calling a formula from a formula, the input data type within the called formula doesn't match the data type specified from the calling formula.
Output Has Different Types In Called and Calling Formulas	When calling a formula from a formula, the output data type within the called formula doesn't match the data type specified from the calling formula.
Too Many Formula Calls	There are too many formula calls from other formulas.

## FAQs

### When do I run the Compile Formula process?

When you create or update multiple fast formulas at the same time, run the Compile Formula process on the Submit a Process or Report page from the Payroll Administration work area.

### What's the difference between a formula compilation error and an execution error?

Compilation errors occur on the Manage Fast Formulas page when you compile the formula. An error message explains the nature of the error. Common compilation errors are syntax errors resulting from typing mistakes. You can view error messages on the dashboard or go to the messages tab directly after the process is run.

Execution errors occur when a problem arises while a formula is running. The usual cause is a data problem, either in the formula or in the application database.

## 6 Approvals

### Salary and Individual Compensation Approval Tasks: Explained

The Compensation Management business process includes standard approval workflow tasks which are used in various business processes. You can customize these approval workflow tasks to meet your business process requirements.

Approval Workflow Task	Business Process Task Where Used	Applies to Approval Of
ChangeSalaryApprovalFYITask ChangeSalaryApprovalTask	Manage Base Pay	Worker salary changes
ChngEligFYI ChngEligTask RsgnWorkerFYI RsgnWorkerTask	Manage Workforce Compensation	Worker eligibility changes Worker reassignment on the worksheet
VariableAllocationFYITask VariableAllocationTask	Manage Individual Compensation	Individual allocations, such as bonuses and allowances

You view and edit the approval workflow tasks using the Manage Task Configurations for Human Capital Management task in the Setup and Maintenance work area. This task is part of the Define Approval Management for Human Capital Management task list.

For each approval workflow task, you can configure the rules and task.

- Use the Rules tab to define data-driven configuration rules that determine routing.
- Use the Task tab to define event-driven configuration, such as assignment and routing policies, expiration and escalation policies, and notification settings.

The following Rules and Tasks sections contain information about the standard configurations and settings for the delivered approval workflow tasks.

#### Rules

None of the FYI approval workflow tasks have rules. The non-FYI workflow tasks are configured such that if the rule applies, then the notification is routed using the Supervisory list builder and response is required.

The rules for these tasks use a single level of the supervisory hierarchy:

- ChngEligTask
- RsgnWorkerTask

The rules for these tasks use two levels of the supervisory hierarchy:

- ChangeSalaryApprovalTask
- VariableAllocationTask

While none of these approval workflow tasks includes threshold rules by default, you can configure rules based on salary change percentage, salary change amount, current and new compa-ratio, grade, job, and so on. For example, you can create a rule that routes salary approvals when the change from the current salary to the new one exceeds 10 percent using this IF statement: `Task.payload.getSalaryApprovalValuesResponse.result/value.newChangePercent more than 10.00`.

## Task

The following table shows the default assignment and routing policies vary between FYI and non-FYI tasks.

Tasks	Configuration	Routing Policy
FYI Tasks	<b>Enable auto claim</b> selected.	Used when the task is sent to a group of people. The first person who acts on the task, rather than just reviewing it, automatically becomes the task owner. Without auto claim, the person claiming the task must click the Claim button before he or she can work on the task.
Non-FYI Tasks	Each task completes when the participant selects <b>Reject</b> .	With this configuration, if the first-level manager rejects the task, the task completes and does not proceed to the next level manager for approval. This setting also ensures that the task does not complete when the first-level manager approves it. Rather, the task continues to the next, final level for approval.

The expiration and escalation policy for all tasks is set to **Never Expires**.

Notification settings identify what business process task status causes a notification to be sent, as well as the notification recipient. The following table identifies the settings for the Compensation Management approval workflow tasks.

Approval Workflow Task	Business Process Task Status	Notification Recipient
All	Assigned	Assignees
All	Complete	Task initiator
ChangeSalaryApprovalFYITask	Error	Task owner
ChangeSalaryApprovalTask		
ChngEligTask		
RsgnWorkerTask		
VariableAllocationFYITask		
VariableAllocationTask		

Approval Workflow Task

Business Process Task Status

Notification Recipient

All non-FYI workflow tasks are also set to:

- Make notifications actionable
- Send task attachments with e-mail notifications

## Defining Approvals for Human Capital Management: Explained

You can manage approval policies using the tasks Manage Approval Transactions for Human Capital Management and Manage Task Configurations for Human Capital Management.

### Managing Approval Transactions

Using the Manage Approval Transactions page, you can configure approval policies for many HCM tasks, including, but not limited to, the following:

- Hire
- Promote
- Transfer
- Terminate

You can select approvers for a task, arrange approvers in the required sequence, define approval rules for each approver, and configure conditions for each rule.

### Managing Task Configurations

The Manage Task Configurations for Human Capital Management task navigates to the BPM Worklist. You can use the BPM Worklist to review and configure approval policies for HCM tasks; however, we recommend that you use the Manage Approval Transactions for Human Capital Management task. Using either UI, you can configure the following approval details:

- When to issue approval notification
- Who can access task contents
- What actions are available to approvers
- What to do when errors occur during approval routing
- When tasks expire or when should tasks be escalated
- When approvers can add additional approvers

### Approval Flow

Approval Management configuration options for Oracle Fusion Human Capital Management determine most of the actions that are available to the participants in the approval process. For example:

- Either approver can reject the transaction. By default, the approval process stops when the transaction is rejected.

- The second-level manager can push the transaction back to the first-level manager, who then has a second opportunity to review the transaction and either approve or reject it, as appropriate.
- Insertion of approvers in the approval list is permitted.
- Approvers can delegate their approval responsibilities to other approvers.

If you change the default settings of the Approval Management configuration options for a task, then different actions or action outcomes become available to this approval flow.

## Managing HCM Approval Transactions: Explained

To manage approval transactions, use the Manage Approval Transactions for Human Capital Management task in the Setup and Maintenance work area.

You can search for approval transactions and perform the following actions on a transaction:

- Configure approval rules
- View the failed and pending processes
- Bypass approvals

### Approval Rules Configuration

To view or configure the approval rules for a transaction, search for the transaction and click the Configure button in the Rules column in the search results. You can edit and save the approval rules in the Manage Approval Rules interface.

### Failed and Pending Processes

An approval process may fail due to various reasons, for example, if there is a network or database outage or an issue in the approval rules setup. An approval process may also remain in a pending state waiting for approval. The Manage Approval Transactions page provides you information on whether a process has failed or is pending, and how many instances of the process have failed or are pending. You can drill down to each instance and view further details. For failed processes, you can view the error message generated in the application, and for pending processes, you can view the list of approvers. You can either withdraw a failed process or configure the approval rules and resubmit the process. If you withdraw the process, then the process is canceled and the user can begin the flow again.

### Bypassing Approvals

The application automatically initiates the approval process upon submitting a transaction, if the transaction has approvals configured. You can override this behavior by enabling the Bypass Approvals option for the transaction. If you bypass approval for a transaction, the transaction is committed immediately upon submit and is not routed for approval.

#### Note:

When you submit a termination transaction, you can select the Deferred processing option to postpone processing the transaction until the termination date. This option is typically used in future-dated terminations. However, if you enable Bypass Approvals for the termination transaction, the Deferred processing option will not be available for selection.

#### *Related Topics*

- [Hiding Terminations: Critical Choices](#)

# The Manager Hierarchy: How It's Maintained

In many situations, a person's manager hierarchy must be readily available. For example, a person's line manager may be required during an approval process, and business intelligence reports often retrieve data based on a manager hierarchy. This topic describes how the manager hierarchy is maintained.

## How the Manager Hierarchy Is Maintained

A person's manager hierarchy could be derived from active data tables, but the impact of that approach on performance is unpredictable. Therefore, the complete manager hierarchy for each person is extracted from data tables and stored in a separate manager hierarchy table. This table is known as the denormalized manager hierarchy. The denormalized manager hierarchy ensures that a person's manager hierarchy is both easily accessible and up to date.

Whenever a change is made to a person's manager hierarchy through the application pages, the change is reflected automatically in the denormalized manager hierarchy table. You use the Refresh Manager Hierarchy process to populate the denormalized manager hierarchy table when person records are migrated from other applications.

You run the Refresh Manager Hierarchy process in the Scheduled Processes work area. To run the process, you must have the Human Resource Specialist job role. The process has no default schedule. You can run the process occasionally to perform a complete refresh of the denormalized manager hierarchy. Alternatively, you can specify a schedule to run the process at regular intervals. Refresh Manager Hierarchy processes all types of manager hierarchies.

In addition to performing full refreshes of the manager hierarchy, you can perform incremental refreshes. With this approach, you refresh the hierarchy based on manager changes occurring in the previous N days. Schedule a full refresh every month or quarter and an incremental refresh every day or week, for example.

# Approval Management Configuration Options for Oracle Fusion Human Capital Management: Explained

Approval Management has the following default configuration options for all applications in the Oracle Fusion Human Capital Management family.

Configuration Option	Default Value	Effect of Default Value
Ad hoc insertion of approvers	True	Ad hoc insertion of approvers in the approval list is allowed. Users who add approvers may also modify or remove the approvers that they add.
Allow delegate	True	Approvers can delegate their approval responsibilities to other users. One approver replaces another, but the approver list is otherwise unaltered.

Configuration Option	Default Value	Effect of Default Value
Allow push back	True	An approver can push the transaction back to the previous approver, who thereby has a second opportunity to review the transaction.
Allow reassign	True	Any approver can reassign the approval to a different approver. The approval list is recalculated based on the new approver.
Allow request information	True	Approvers can request more information from another approver or the person who submitted the transaction.
Allow self-approval	False	The person who submits the transaction can't approve it.
Allow withdraw	True	The requester or an administrator can withdraw a transaction while the approval process is incomplete. Approvers who have already approved are notified of the withdrawal. The transaction is removed from the worklists of approvers who haven't yet approved.
On error notify	Human Resources Application Administrator	A Human Resources Application Administrator is notified automatically when an error occurs.
Period before task expires	None	Approval tasks don't expire.
Period before task escalates	None	Approval tasks aren't escalated to other approvers.
Escalated approver	None	Approval tasks aren't escalated to other approvers.
Repeated approver frequency	Once per approval	An approver receives one notification per transaction, even when the approver appears multiple times in the approver list.
Re-evaluate approver list	True	The approver list is regenerated after every response.
Rejection outcome	Stop all	When an approver rejects a transaction, the approval process stops and the transaction is canceled.



## Managing Approval Rules: Explained

Use the Manage Approval Transactions for Human Capital Management task to configure approval policies for HCM tasks such as Hire or Promote. This interface works in conjunction with the BPM Worklist, but enables users to identify approvers and configure approval rules easily for some frequently performed HCM tasks.

### Configuring Approval Policies

For a selected task, you can configure the approval policy by arranging approvers in the required order, defining approval rules for each approver, and submitting the approval policy. The approval policy takes effect immediately and supersedes the current approval policy for the selected task; however, in-progress approvals complete as expected and do not switch to the new policy.

### Approvers

You can add the following types of approvers:

- Management Hierarchy or Supervisory Hierarchy
- Users
- Approval groups, which you define in BPM Worklist
- Position hierarchy
- Representatives, who are workers with assigned responsibilities, for example Benefits Representative
- Application role
- Job-level based line manager hierarchy
- Self auto approve

### When to Use the BPM Worklist

Use the BPM Worklist to:

- Configure notifications, including when notifications are issued
- Configure process details, such as expiration and escalation policies
- Define approval groups
- Define approval rules in advanced mode

For any HCM tasks that are not available in the Manage Approval Transactions interface, you can use the BPM Worklist to configure all aspects of approvals. To configure in the BPM Worklist, use the Manage Task Configurations for Human Capital Management task.

## Approver Types: Explained

You can include any number of approvers of various types in your approval sequence by dragging and dropping them into the approval flow. This topic explains each of the approver types.

## Management Hierarchy or Supervisory Hierarchy

You can include the following predefined types of managers in your approval sequence:

- Line manager
- Resource manager
- Project manager
- Regional manager

If your enterprise defines additional types of managers, then they appear automatically in the Approvers section of the Manage Approval Rules page. You can include them in the approval sequence.

## Users

You can include one or more Oracle Fusion Applications users in the approval sequence.

## Approval Groups

You create approval groups using the BPM Worklist. When defining your approval sequence, you can enter the names of one or more existing approval groups.

## Position Hierarchy

If you include a position hierarchy in your approval sequence, then position holders are invited to approve the transaction. For positions with more than one position holder, the transaction is approved by the first position holder to approve.


## Responsibility Holders

You can include holders of the following predefined responsibilities in your approval sequence:

- Human Resources Representative
- Benefits Representative
- Union Representative
- Payroll Representative

If your enterprise defines additional responsibility types, then they appear automatically in the Approvers section of the Manage Approval Rules page. You can include them in the approval sequence.

Human Resource (HR) Specialists assign responsibilities to workers using the Manage Areas of Responsibility task. A worker becomes an approver for a transaction if he or she has that responsibility for the transaction subject. For example, if you specify the Benefits Representative as an approver for a promotion, then the Benefits Representative of the worker who is being promoted is invited to approve the promotion.

 **Note:** If you use a responsibility holder, then ensure that responsibility holders are already defined in the application. For example, if you include a HR representative as an approver for an employee process, then all employees must have HR representatives assigned to them.

## Application Roles

You can use any of the existing duty roles to include in your approval sequence. If your enterprise defines duty roles for security purposes, then you can enter the duty role to include them in the approval sequence. Users with job or data roles that inherit the duty role become transaction approvers.

## Job Level

You can include a job level in your approval sequence.

Job level routings are based on the manager hierarchy defined in Oracle Fusion Human Capital Management. The approval list is generated based on the starting level specified in a rule and continues until an approver with a sufficient job level is found. The approval flow uses the job level defined in the Manage Jobs interface.

### Related Topics

- [Areas of Responsibility: Explained](#)

## HCM Approval Rules: Explained

Using the Manage Approval Transactions for Human Capital Management task, you can specify one or more approval rules for each task. To create more than one approval rule, you either add a rule or duplicate a selected rule and edit it as appropriate. When you create multiple approval rules for a task, they are evaluated in the order of the rule's priorities. When the priorities are the same for different rules, they are executed in an undefined order, sequentially.

Approval rules comprise one or more IF statements and one or more THEN statements.

## IF Statements (Conditions)

IF statements are tests that determine when an approval rule takes effect. For example, you could specify that an approval rule for a promotion takes effect when the worker's department is Sales or the worker's job is Area Manager.

You can specify multiple IF statements. If you join multiple statements with "AND" operators, then all statements must be true before the approval rule takes effect. If you join multiple statements with "OR" operators, then at least one of the statements must be true before the approval rule takes effect.

## THEN Statements (Actions)

THEN statements specify:

- Who the approvers are
- What actions approvers can take

The following table summarizes the approval actions.

Approval Action	Description
Approval required	Notifications are issued to the identified approvers and their response is required.

Approval Action	Description
Automatic approval	No notifications are issued to the identified approvers. The transaction is either approved or rejected automatically, and the approvers are recorded as having approved or rejected the transaction. The value of the <b>Set Outcome To</b> attribute for manager hierarchies determines whether the transaction is approved or rejected.
FYI only	Notifications are issued to the identified approvers, but no response is expected.

## Management Hierarchy Approval-Rule Attributes

When you define approval policies using the Manage Approval Transactions for Human Capital Management task, you can create one or more approval rules for manager hierarchies of predefined and locally defined types. This topic describes the values that you can specify in the THEN statements of approval rules for manager hierarchies.

### Attributes

The following table summarizes the attributes of the manager-hierarchy approval rules and their default values.

Attribute Name	Description	Values	Default Value
Action Type	Allows users to choose from Approval required (participants need to act on the transaction), Information only (participants get FYI notifications), and Automatic approval (participants do not need to act, transaction is auto approved).	<ul style="list-style-type: none"><li>• Approval required</li><li>• Information only</li><li>• Automatic approval</li></ul>	Approval required
Route Using	Allows users to choose which manager to route through.	<ul style="list-style-type: none"><li>• Resource manager</li><li>• Line manager</li><li>• Project manager</li><li>• Regional manager</li><li>• Custom Manager Types</li></ul>	Line Manager
Approval Chain of	Allows users to choose which approval chain to use.	<ul style="list-style-type: none"><li>• Requestor</li><li>• User</li><li>• Worker</li><li>• Worker's Current Line Manager</li><li>• Worker's Proposed Line Manager</li></ul>	Requestor
Start With Changed from Initial Approver	<ul style="list-style-type: none"><li>• Identifies both the first approver and the manager hierarchy. By default, approval requests are sent to the requester's first-level manager, and the</li></ul>	<ul style="list-style-type: none"><li>• Manager</li><li>• Employee</li><li>• Second Level Manager</li></ul>	Manager

Attribute Name	Description	Values	Default Value
	<p>manager hierarchy is the one associated with the requester's primary assignment. The requester is the worker who submits the transaction.</p> <ul style="list-style-type: none"> <li>If you select a user in Approval Chain of, then the manager hierarchy is the one associated with that user's primary assignment. For example, when promoting one of your direct reports you could select as initial approver a human resource (HR) specialist who is outside your manager hierarchy; approval requests from this rule would be directed to the manager hierarchy of the HR specialist's primary assignment.</li> <li>If you select a user who is not a manager, then the rule fails.</li> </ul>		
Number of Levels	<ul style="list-style-type: none"> <li>Controls how far up the selected manager hierarchy approval requests are sent. The first level is based on the <b>Start With</b> value.</li> <li>Approval routing stops when either the number of levels or the topmost approver is reached, whichever occurs first.</li> </ul>	<ul style="list-style-type: none"> <li>Worker's Current Line Manager</li> <li>1 or higher</li> </ul>	1
Top Approver	<ul style="list-style-type: none"> <li>Specifies an approver above whom approvals are not routed.</li> <li>Approval routing stops when either the number of levels or the topmost approver is reached, whichever occurs first.</li> </ul> <p>For the top approver value, you can select:</p> <ul style="list-style-type: none"> <li>A different manager (first-level or second-level, as appropriate).</li> <li>A user who is a manager from the same manager hierarchy as the initial approver.</li> </ul>	<ul style="list-style-type: none"> <li>Worker</li> <li>Worker's Proposed Line Manager</li> <li>Requestor</li> <li>User</li> <li>Manager</li> <li>Second Level Manager</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> </ul>

Attribute Name	Description	Values	Default Value
	If you select a user who is not a manager or is from a different manager hierarchy from the initial approver, then the topmost approver is not found. In this case, routing of approvals stops when the number-of-levels value is reached.		
Set Outcome ToThis only renders when Action Type is set to Automatic approval.	Specifies the outcome for automatic approvals. If you set this value to <b>Approve</b> , then all identified approvers are recorded as having approved the transaction, even though the approval is automatic. Similarly, if you set this value to <b>Reject</b> , then all identified approvers are recorded as having rejected the transaction.	<ul style="list-style-type: none"> <li>Approve</li> <li>Reject</li> </ul>	None

## Position Hierarchy Approval-Rule Attributes

When you define approval policies using the Manage Approval Transactions for Human Capital Management task, you can create one or more approval rules for a specified position hierarchy.

### Attributes

The following table summarizes the attributes of the position-hierarchy approval rules and their default values.

Attribute Name	Description	Values	Default Value
Action Type	Allows users to choose from Approval required (participants need to act on the transaction), Information only (participants get FYI notifications), and Automatic approval (participants do not need to act, transaction is auto approved).	<ul style="list-style-type: none"> <li>Approval required</li> <li>Information only</li> <li>Automatic approval</li> </ul>	Approval required
Job Level	<ul style="list-style-type: none"> <li>The number of job levels. Approvals are routed to approvers between the initial and topmost approvers in the position hierarchy based on this value.</li> <li>You can specify the job levels as absolute values</li> </ul>	Minimum and maximum values relative to: <ul style="list-style-type: none"> <li>Initial approver</li> <li>Requester</li> </ul>	At most 1 relative to initial approver  At least 1 relative to initial approver

Attribute Name	Description	Values	Default Value
	<p>(for example, a minimum of 2 and a maximum of 4). Alternatively, you can specify the values relative to either the initial approver or the requester. The requester is the person who submits the transaction.</p> <ul style="list-style-type: none"> <li>Approval routing stops when either the number of job levels or the topmost approver is reached, whichever is sooner.</li> </ul>	Absolute minimum and maximum values	
Position Hierarchy	<ul style="list-style-type: none"> <li>The name of the position hierarchy</li> <li>You can select from all position hierarchies in the enterprise</li> </ul>	All position hierarchies in the enterprise	None
Starting Position Changed from Initial Approver	<ul style="list-style-type: none"> <li>The position of the first approver</li> <li>The approval notification is sent to all workers who have the position, and the transaction is approved by the first worker to approve</li> </ul>	All positions in the selected position hierarchy	None
Job Level	<ul style="list-style-type: none"> <li>The number of job levels. Approvals are routed to approvers between the initial and topmost approvers in the position hierarchy based on this value.</li> <li>You can specify the job levels as absolute values (for example, a minimum of 2 and a maximum of 4). Alternatively, you can specify the values relative to either the initial approver or the requester. The requester is the person who submits the transaction.</li> <li>Approval routing stops when either the number of job levels or the topmost approver is reached, whichever is sooner.</li> </ul>	<p>Minimum and maximum values relative to:</p> <ul style="list-style-type: none"> <li>Initial approver</li> <li>Requester</li> </ul> <p>Absolute minimum and maximum values</p>	<p>At most 1 relative to initial approver</p> <p>At least 1 relative to initial approver</p>
Top Position	<ul style="list-style-type: none"> <li>The position of the topmost approver</li> <li>The approval notification is sent to all workers who have the position, and the transaction is approved</li> </ul>	All positions in the selected position hierarchy	None

Attribute Name	Description	Values	Default Value
	by the first worker to approve <ul style="list-style-type: none"> <li>Approval routing stops when either the number of levels or the topmost approver is reached, whichever is sooner</li> </ul>		
Include	Allows users to choose which approvers to include.	<ul style="list-style-type: none"> <li>All Approvers</li> <li>First and last approvers</li> <li>Last approver only</li> </ul>	All approvers

## Defining an HCM Approval Policy: Worked Example

This example shows how to define an approval policy for employee hires in the Sales department using the Manage Approval Transactions for Human Capital Management task.

If the Department of the new hire is Sales, approvals should route to the first level line manager of the requester and FYI only to the HR Representative of the worker.

If the Department of the new hire is Finance, approvals should route to the second level line manager of the requester and FYI only to the HR Representative of the worker.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Who will approve employee hire requests?	<ul style="list-style-type: none"> <li>Managers in the Sales department.</li> <li>The human resources representative of any new hire doesn't need to approve but is informed of the hire after the relevant manager has approved.</li> </ul>
Which approval actions must approvers take?	<ul style="list-style-type: none"> <li>Managers must approve the hire.</li> <li>The human resources representative receives an approval notification for all hires, but no response is needed.</li> </ul>
Can the required level of management approval vary?	<p>The required level of approval varies with the grade of the new hire.</p> <p>The requester's:</p> <ul style="list-style-type: none"> <li>First-level manager approves the trainee grades 1 through 3</li> <li>Second-level manager approves the professional grades 4 and above</li> </ul>



## Summary of the Tasks

To define the approval policy in this example, you:

1. Navigate to the Manage Approval Rules: Hire an Employee page.
2. Assemble the approval sequence.
3. Define the approval rule for trainee grades.
4. Define the approval rule for professional grades.
5. Define the approval rule for all grades.

## Navigating to the Manage Approval Rules: Hire an Employee Page

1. In the Setup and Maintenance work area, click the Search button and search for the task Manage Approval Transactions for Human Capital Management.
2. In the Search Results region, click the task name.
3. On the Manage Approval Transactions page, enter the search term Hire in the **Name** field.
4. Click **Search**.
5. In the Search Results region, click the Configure button in the Rules column for the transaction Hire an Employee.

## Assembling the Approval Sequence

1. On the Manage Approval Rules: Hire an Employee page, confirm that an entry for Line Manager appears in the Approval Sequence region.
2. In the Approvers region, click the **Add** icon on the Human Resources Representative entry to add it to the right of the Line Manager entry in the Approval Sequence region.

## Defining the Approval Rule for Trainee Grades

1. In the Approval Sequence region, select the Line Manager entry.
2. Click the **Edit** icon to edit the rule settings.
3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresTraineeGrades. (The name can't contain spaces.)
4. In the IF statement for the SalesHiresTraineeGrades rule, click the **Add** icon to the right of the first condition to create an additional condition.
5. Complete the fields of the two condition statements as shown in this table.

Attribute Name	Operator	Attribute Value	And or Or
Department	==	Sales	and
Grade	<=	3	

6. In the THEN statement for the SalesHiresTraineeGrades rule, complete the fields as shown in this table.

Field	Value
<b>Action</b>	Approval required
<b>Route Using</b>	Line Manager
<b>Approval Chain of</b>	Requestor
<b>Start with</b>	Manager
<b>Number of Levels</b>	1
<b>Top Approver</b>	Manager

## Defining the Approval Rule for Professional Grades

1. Click **Add Rule**.
2. Click the **Edit** icon to edit the rule settings.
3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresProfessionalGrades.
4. In the IF statement for the SalesHiresProfessionalGrades rule, click the **Add** icon to the right of the first condition twice to create two additional conditions.
5. Complete the fields of the three condition statements as shown in this table.

Attribute Name	Operator	Attribute Value	And or Or
Department	==	Sales	and
Grade	>	3	and
Grade	<=	6	

6. In the THEN statement for the SalesHiresProfessionalGrades rule, complete the fields as shown in this table.

Field	Value
<b>Action</b>	Approval required
<b>Route Using</b>	Line manager
<b>Approval Chain of</b>	Requester
<b>Start with</b>	Second Level Manager
<b>Number of Levels</b>	1

Field	Value
<b>Top Approver</b>	Second Level Manager

## Defining the Approval Rule for All Grades

1. In the Approval Sequence region, select the Human Resources Representative entry.
2. In the Rules region for the new rule, click the **Edit** icon to edit the rule settings.
3. In the **Name** field of the **Edit Rule Settings** window, enter the rule name SalesHiresAll Grades.
4. In the IF statement for the SalesHiresAllGrades rule, complete the fields of the condition statement as shown in this table.

Attribute Name	Operator	Attribute Value
Department	==	Sales

5. In the THEN statement of the SalesHiresAllGrades rule, complete the fields as shown in this table.

Field	Value
<b>Action</b>	Information Only
<b>Representative Type</b>	Human Resource Representative
<b>Representative of</b>	Worker's Proposed Representative

6. Click Submit.



# 7 Base Pay

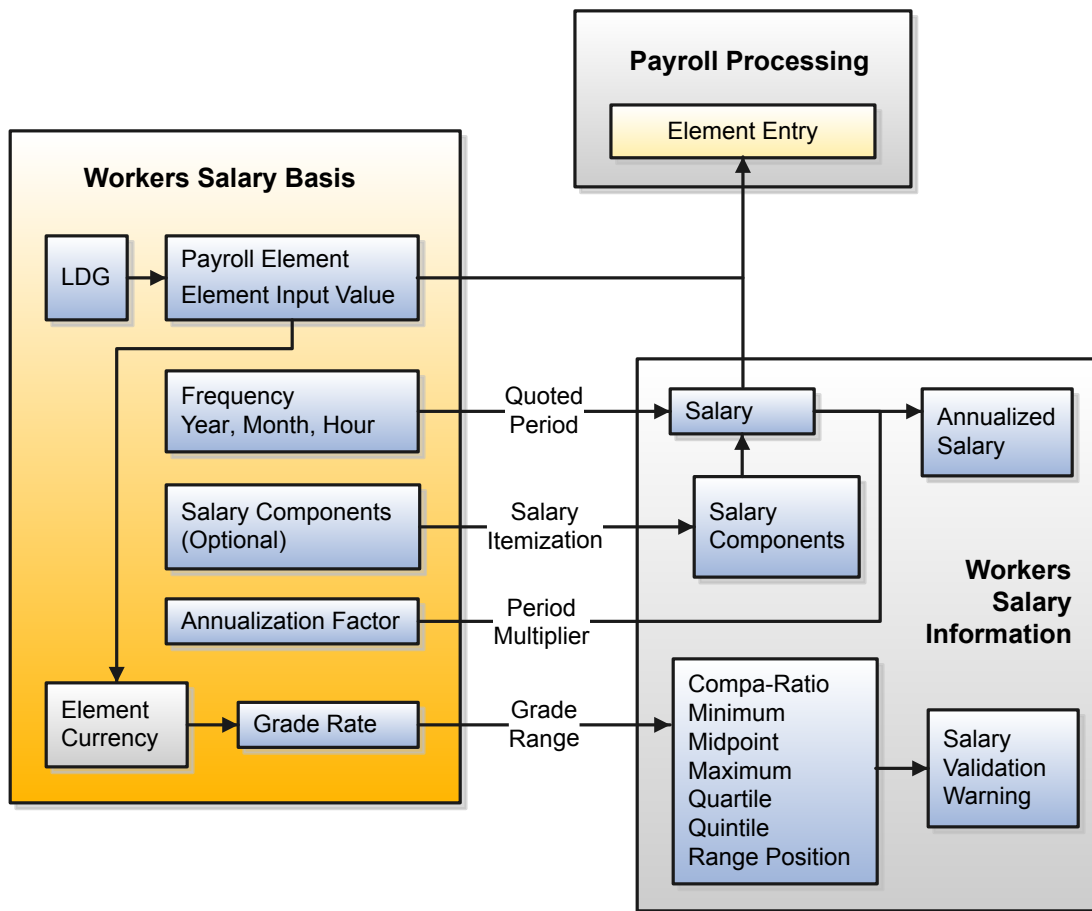
## Overview

Configure compensation frequency values, grade rate validation data, and payroll elements for quoting and paying base pay. Also manage lookups, actions, and action reasons related to base pay management. Application implementors and compensation administrators use the Base Pay task list in the Compensation work area.

## Salary Basis: How It Works With Salary Information and Payroll Processing

The salary basis specifies the frequency of the amount sent to payroll and stored as salary, such as annual or hourly amount. It also specifies the payroll element and input value that feeds the salary to payroll and the grade rate that provides the salary range.

The following figure show how data on a worker's salary basis contributes to salary information and payroll processing.



## LDG

The legislative data group (LDG) restricts the payroll elements available to associate with the salary basis.

## Payroll Element and Element Input Value

The salary basis holds the payroll element for base pay. You specify an **input value** that holds base pay on a worker's **element entry**. The payroll run detects and processes the element entry. The resulting base pay earnings appear on the payslip for the payroll element associated with the salary basis.

## Frequency

Frequency defines the time period of a worker's quoted base pay, such as hourly or annually. The salary record stores base pay and passes it to payroll in this frequency.

## Salary Components (Optional)

Salary components itemize new or adjusted salary into one or more components that reflect different reasons for the allocation, such as merit, adjustment, and location. Component itemization is for salary calculation and reporting purposes only. Itemized amounts don't pass to payroll.

## Annualization Factor

The annualization factor is the multiplier that converts base pay at the selected frequency to an annualized salary amount.

## Grade Rate (Optional)

The **grade rate** associated with the worker's salary basis supplies the worker's salary range information used for salary metrics calculations and validation warning.

### *Related Topics*

- [Salary Component Lookups: Explained](#)
- [Grade Rates: Explained](#)

## How Many Salary Bases to Create: Points to Consider

You must create a separate salary basis, with a unique name, for each unique combination of the following characteristics associated with a worker's base pay:

- Legislative data group
- Frequency of quoted base pay salary
- Annualization factor
- Payroll element, input value, and currency
- (Optional) Salary components
- (Optional) Grade rate

After you associate the salary basis with any worker, you can't delete it or modify any characteristic. Using a descriptive name for the salary basis is a good practice if you require many salary bases in your organization.

Use the following questions to help determine how many salary bases you require.

### Legislative Data Group

How many legislative data groups (LDGs) are there? Because you can't share payroll elements across LDGs, you can't share the salary bases attached to them.

### Frequency

How many different frequencies for quoting base pay are in use? Workers who have multiple assignments or employment terms on different payroll frequencies require a different salary basis associated with each assignment or employment term.

## Annualization Factor

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

## Payroll Element

Do you want to use the same payroll element for different salary bases? You can use the same payroll element in more than one salary basis, if it meets these requirements:

- A recurring earnings element
- Configured to allow multiple entries in the same period
- Configured for the same legislative data group

## Currency

How many different currencies do your payroll elements use for each LDG? You have one payroll element for each currency within an LDG. You have one salary basis for each payroll element.

## Components

Do you want to itemize salary into components? You require one additional salary basis for each additional unique collection of components.

## Grade Rates

How many different grade rates do you require? The number of salary bases increases by one for each additional grade rate in use.

### *Related Topics*

- [Grade Rates: Explained](#)
- [Salary Component Lookups: Explained](#)

## LDG and Payroll Element for Base Pay: Points to Consider

When selecting a payroll element and input value for a salary basis, the legislative data group (LDG) determines the elements available and other restrictions apply.

## Legislative Data Group

You configure each salary basis for a specified legislative data group. If your organization has multiple legislative data groups, you must create a uniquely named salary basis for each unique set of characteristics applicable to each legislative data group.



## Payroll Element

You attach a single existing payroll element to each salary basis to hold base pay earnings. The elements that are available to select meet the following criteria:

- Are valid for the selected legislative data group
- Are recurring
- Are classified as either Earning or Information
- Include eligibility definition

The required element eligibility definition may include eligibility criteria, but criteria aren't required.

- Are defined at either the Assignment or Employment Terms level

## Restrictions

You can link recurring elements to multiple salary bases only if you classify them as earnings elements and configure them to enable multiple entries in the same period. You might use the same payroll element when two salary bases with the same frequency use different grade rates. Examples:

- Headquarters-based grades have base pay of X
- Grades for all other locations have base pay of X - 2 percent

## Input Value

When you define a base pay payroll element, you specify an input value that holds base pay on a worker's element entry. For both base pay salary and hourly wages the element input value is **Amount**. Entering or updating a base pay amount for a worker automatically updates the base pay element entry for that person.

The monetary amount or rate recorded in the element entry is the salary value in the worker's salary information held on the assignment or employment terms. That amount is in the frequency of the worker's salary basis.

This table shows how the payroll formula processes the input values of base pay element entries received in the frequency of the salary basis:

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

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

## Currency

The element currency automatically determines the salary basis currency, in which the worker is paid.

# Frequency and Annualization Factor on Salary Basis: Points to Consider

Frequency on the salary basis defines the time period of a worker's quoted base pay. The annualization factor is the multiplication factor that converts base pay at the selected frequency to an annualized amount.

## Selecting Base Pay Frequency

To match the salary basis frequency to the payroll frequency, select **Payroll period** frequency on the salary basis. Be sure to define the associated payroll element at the terms level and also assign workers to payrolls. A worker who has multiple assignments or employment terms on different payroll frequencies requires a different salary basis associated with each assignment or employment term.

## Selecting the Annualization Factor

The following table shows the default factors supplied for the available frequency options. You can override the supplied default values.

Frequency	Default Annualization Factor
Annually	1
Monthly	12
Hourly	No default. Enter the number of hours in a work year to multiply by the hourly rate to calculate the annualized salary for this salary basis.
Payroll Period	Not available. The period type on the payroll linked to a worker's employment terms determines annualization.

The annualized amount:

- Shows how much a worker would be paid over a year, at the current rate
- Appears on compensation transaction pages

## Periodicity Conversion: Explained

Rate conversion formulas convert amounts to different periodicities for payroll calculations. The following calculations use rate conversion formulas: proration, hours multiplied by rates calculation of an element run result, and rates based on rate definitions. If the periodicity values used in the predefined formulas don't meet your requirements, you can create your own formula. Copy the text from the predefined formula and edit it. For example, edit the periodicity values in your formula to specify a different number of working hours to use when converting annual values into hourly rates.

This topic covers the following aspects:

- Defining periodicity
- Customizing rate conversion formulas

## Defining Periodicity

The following table lists the objects where you define periodicity.

Object	Description
Element	The Periodicity input value specifies the frequency of the element value. For example, salary element entries that hold annual salary values have a periodicity of Annual.
Payroll Definition	Period Type specifies the number of payroll periods.  For example, a period type of Monthly Lunar includes 13 payroll periods.
Rate	Rate definition can specify the following periodicities: <ul style="list-style-type: none"> <li>• Return periodicity of the rate</li> <li>• Periodicity of each rate contributor</li> <li>• Periodicity of the calculated sum of the rate contributors</li> </ul>

The following table lists predefined values. If these values don't meet your requirements, you can copy a predefined rate conversion formula and edit its periodicity values.

Periodicity	Used as a Payroll Period	Number of Periods in a Year
Annually	Yes	1
Bimonthly	Yes	6
Biweekly	Yes	26
Calendar Monthly	Yes	12
Daily	No	365
Hourly	No	2920 (365 days multiplied by 8 hours)
Lunar Month	Yes	13
Periodically	No	Payroll frequency determines the number of periods to use in the rate conversion.
Quarterly	Yes	4

Periodicity	Used as a Payroll Period	Number of Periods in a Year
Semiannually	Yes	2
Semimonthly	Yes	24
Workday	No	260
Weekly	Yes	52
Work Hour	No	2080 (260 days multiplied by 8 hours)

## Customizing Rate Conversion Formulas

The rate conversion formulas convert the periodicity of an amount to a different periodicity. For example, the annualized rate conversion formula converts an annual salary amount to a weekly amount. The following table describes the two predefined formulas.

Formula	Calculation	Example
Annualized Rate Conversion	<p>The formula converts the:</p> <ol style="list-style-type: none"> <li>1. Source amount and periodicity to an annual value.</li> <li>2. Amount to the required periodic rate.</li> </ol>	<p>To convert a weekly amount to a semimonthly periodicity, the formula:</p> <ol style="list-style-type: none"> <li>1. Multiplies the weekly amount by 52.</li> <li>2. Divides the result by 24.</li> </ol>
Daily Rate Conversion	<p>The formula:</p> <ol style="list-style-type: none"> <li>1. Calculates a daily rate.</li> <li>2. Converts amount to the required periodic rate.</li> </ol>	<p>To convert an annual amount to daily periodicity, the formula:</p> <ol style="list-style-type: none"> <li>1. Divides the annual amount by 365.</li> <li>2. Multiplies the result by the number of days in the payroll period.</li> </ol>

### Related Topics

- [Customizing Periodicity Conversion Rules: Procedure](#)
- [Using Formulas: Explained](#)
- [Creating Rate Definitions: Points to Consider](#)
- [Customizing Conversion Formulas for Proration: Procedure](#)

## Salary Components on Salary Basis: Points to Consider

Salary components itemize new or adjusted salary to reflect different reasons for the allocation, such as merit or location. Component itemization is for informational purposes only.

## Component Configuration

To configure the use of salary components during salary entry or adjustment, use the Manage Salary Basis task and select from the following options:

- Don't use components.
- Select specific components to display to managers and professionals during allocation.
- Enable managers and professionals to select components during allocation.

## Component Processing

When salary component values change, the payroll element holds the new salary value calculated from the component adjustment. Payroll does not receive individual component values for processing.

## Component Example

The following are typical salary adjustment components in the US, shown with example adjustment percentages:

- Merit: 6 percent
- Promotion: 4 percent
- Adjustment components: 2 percent

## Salary Component Lookups: Explained

Salary components itemize new or adjusted salary to reflect different reasons for the allocation. You can edit or add components to the Salary Component lookup type during initial implementation and at any later time. The following salary components are predefined:

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

To add to or edit these codes in the CMP\_SALARY\_COMPONENTS lookup type, search for the Manage Common Lookups task in the Search: Tasks pane or All Tasks tab search area.

## Component Itemization

Component itemization is for notification purposes only. When component values change, the payroll element holds the new salary value calculated from the component adjustment. Payroll doesn't receive individual component values for processing.

### Related Topics

- [Lookups: Explained](#)

## Grade Rate on Salary Basis: Points to Consider

The optional grade rate that you associate with the worker's salary basis supplies the worker's salary range information for:

- Calculation and display of salary range metrics, such as compa-ratio or quartile
- Validation warning for salary amounts and adjustments outside the salary range for the worker

### Selecting a Grade Rate

Use the Manage Salary Basis task in the Compensation work area. Consider these points when selecting the grade rate:

- You can associate only one existing grade rate with the salary basis.
- Only grade rates with the following characteristics are available to associate with the salary basis:
  - Valid for the selected legislative data group
  - Defined in the same currency as the currency of the payroll element
- The frequency of the grade rate doesn't have to match the frequency of the salary basis. For example: You can attach a grade rate defined with a monthly frequency to a salary basis with an annual frequency.

### Showing Salary Metrics

If you want calculated metrics to appear on the salary transaction pages, you must:

- Include a grade rate on the salary basis.
- Ensure that the persons associated with the salary basis have a grade in the selected grade rate.

## Validating Salaries: Points to Consider

Salary validation helps you verify that salary allocations fall within the appropriate range for each worker. You can decide between two methods of validating salaries:

- Grade range validation produces a warning.
- Payroll element validation prevents approval.

### Grade Range Validation

Generate a warning message when a manager or compensation professional enters a new or adjusted salary that's outside the worker's grade range. The worker's grade in the grade rate attached to the salary basis defines the minimum and maximum grade range values.

## Payroll Element Validation

Prevent approval of a new or adjusted salary that doesn't pass validation configured on the payroll element input. When you define an input value for the salary element, you can:

- Enter minimum and maximum valid values
- Write and attach a formula to perform validation

To vary the validation for different groups of workers, you can enter validation criteria as part of the element eligibility definition.

### *Related Topics*

- [Grade Rates: Explained](#)

## Calculating Full-Time Salary and Annualized Salary: Examples

The following scenarios illustrate how the application calculates annual salary and annualized full-time salary. The scenarios use standard working hours, worker's working hours and full-time equivalent (FTE), salary amount, annualization factor, and frequency.

This topic lists the common assumptions and calculations for the following three scenarios:

- Worker's hours equal the standard working hours
- Worker's hours are less than the standard working hours
- Worker's hours are greater than the standard working hours

## Assumptions

All of the examples assume the following:

- Legal employer standard working hours per week is 40.
- Currency is US dollars (USD).
- FTE is calculated by dividing the worker's working hours per week by the standard working hours per week.
- Annualization factor for hourly workers represents the Legal Employer Standard Working Hours per Week x Weeks per Year.

The standard working hours, working hours, and FTE come from the worker's employment record. You can view it using the Manage Employment task in the Person Management work area. The annualization factor and the frequency for the salary come from the salary basis associated with the worker's salary record.

## Worker's Hours Equal the Standard Working Hours

The following table shows the inputs for this scenario for an hourly rate:

Calculation Input	Value
Worker's standard working hours	40
FTE	1
Annualization factor	2080
Base Pay	15 USD

Calculation:

- Annual salary:  $15 \times 2080 = 31,200$  USD
- Annualized full-time salary:  $15 \times (2080/1) = 31,200$  USD

## Worker's Hours Are Less Than the Standard Working Hours

The following table shows the inputs for this scenario for an hourly rate:

Calculation Input	Value
Worker's standard working hours	20
FTE	0.5
Annualization factor	2080
Base Pay	15 USD

Calculation:

- Annual salary:  $15 \times 2080 \times 0.5 = 15,600$  USD
- Annualized full-time salary:  $15 \times (2080/1) = 31,200$  USD

The following table shows the inputs for this scenario for a monthly rate:

Calculation Input	Value
Worker's standard working hours	20



Calculation Input	Value
FTE	0.5
Annualization factor	12
Base Pay	5,000 USD

Calculation:

- Annual salary:  $5,000 \times 12 = 60,000$  USD
- Annualized full-time salary:  $5,000 \times (12/0.5) = 120,000$  USD

The following table shows the inputs for this scenario for an annual rate:

Calculation Input	Value
Worker's standard working hours	20
FTE	0.5
Annualization factor	1
Base Pay	50,000 USD

Calculation:

- Annual salary:  $50,000 \times 1 = 50,000$  USD
- Annualized full-time salary:  $50,000 \times (1/0.5) = 100,000$  USD

## Worker's Hours Are Greater Than the Standard Working Hours

The following table shows the inputs for this scenario for an annual rate:

Calculation Input	Value
Worker's standard working hours	48
FTE	1.2
Annualization factor	1
Base Pay	20,000 USD

Calculation:

- Annual salary: is  $20,000 \times 1 = 20,000$  USD
- Annualized full-time salary:  $20,000 \times (1/1.2) = 16,667$  USD

## FAQs

### Where does the annualization factor for a salary basis that uses payroll period frequency come from?

The period type on the payroll linked to a worker's assignment or employment terms determines the number of payroll periods in a year.

### Can I use the same payroll element in more than one salary basis?

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

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

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

### Can managers change a salary basis?

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

### What happens if a salary fails grade rate validation?

A warning message informs the manager or compensation professional that the salary is out of the valid range for the worker. The user can ignore the message or revise the salary to fall within the valid range.

# 8 Grade Step Progression

## Managing Grade Step Progression: Procedure

You can use grade step progression to move workers automatically from one grade or grade and step to the next level within a grade ladder. The basic process for managing grade step progression is:

1. Create the progression grade ladder and enter general properties.
2. Add grades.
3. Add rules at the ladder, grade, and step level.
4. Run the progression grade ladder process.
5. Review the results and accept the updates.

Complete the prerequisites and tasks from the Compensation work area.

### Prerequisites

Complete the following tasks before you create the progression grade ladder:

1. Create grades with steps using the Manage Grades task.
2. Add rates to the steps.
3. Define progression rules by creating participant eligibility profiles using the Manage Profiles task.

### Create the Ladder and Enter General Properties

Use the Manage Progression Grade Ladder task to complete the following steps:

1. On the Create Progression Grade Ladder page, Progression Ladder tab, select the basic parameters for the ladder.
  - a. Specify the progression increment, such as grade and steps.
  - b. Specify the confirmation type.

This selection determines what actions are available on the Review Proposed Progressions and Salary Updates page after you run the Run Grade Step Progression process.

Selection	Action Available
Automatic	No available actions
Manual	Accept or reject

- c. Complete any remaining required fields.
2. In the Salary Update Details section, specify whether to include salary updates.
  3. Complete any remaining required fields.

## Add Grades

To add a grade, follow these steps:

1. On the Create Progression Grade Ladder page, Grades and Steps tab **Action** menu, select **Add Grade**.
2. Search and select your grade.
3. Enter the sequence for the place of the grade on the grade ladder.
4. Optionally, click **Expand** to see any steps you defined for the grade.

## Add Rules at the Ladder, Grade, and Step Levels

To add the rules, follow these steps:

1. On the Create Progression Grade Ladder page, Progression Rules tab, add rules that apply to the entire grade ladder.
2. In a grade row, click **Grade Rules**.
3. Add the rules that apply to the grade.
4. For each step, add the rules that apply.
5. Save and close to return to the Progression Rules tab.
6. Repeat steps 2 through 5 to add rules to the remaining grades in the ladder.

## Run the Progression Grade Ladder Process

Use the Run Grade Step Progression task to select the grade ladder and run the process. Note the Process ID.

## Review the Results and Accept the Updates

Use the Review Proposed Progressions and Salary Updates task to complete the following steps:

1. Search for and select your Process ID.
2. On the Results page Progressions and Salary Updates tab, view proposed worker progressions and salary updates and the status of each proposal.

## Progression Grade Ladders: Explained

Progression grade ladders are hierarchies used to group grades and steps and define their sequence. They include the associated progression rules and rates for each grade and step within the ladders. You define progression grade ladders using the Manage Progression Grade Ladders task in the Compensation work area.

Parameters of progression grade ladders are:

- General parameters
- Grades and steps
- Progression rules

## General Parameters

You define parameters for the progression process, such as the grade set, progression increment, and confirmation type. Select one of the following options to update the worker assignment and salary records when you run the Run Grade Step Progression process:

Option	What Gets Updated
Yes	Grade or step value on the assignment record  Salary record with the associated rate from the grade or step
No	Grade or step value on the assignment, but not the salary amount

## Grades and Steps

You define grades using the Manage Grades task and then add them to the ladder on the Grades and Steps tab. You enter the rates for your grades or steps and specify the sequence for each grade.

## Progression Rules

You can associate progression rules at the ladder, grade, and step levels. You define progression rules using the Manage Eligibility Profiles task. The best practice is to associate at least one rule at each level. Absence of a rule indicates that all workers on the grade ladder are eligible for that grade or step.

## Confirmation Types: Points to Consider

When you create a progression grade ladder you use the confirmation type to specify how the Run Grade Step Progression process applies proposed progressions and salary updates. Confirmation types are manual or automatic. You view the process results on the Review Proposed Progressions and Salary Updates page. View any unapplied progressions and updates and corresponding reasons on the Errors tab of the page.

### Manual

You can decide to accept or reject the proposed progressions and salary updates for individual workers or as a group of workers. Accepting a proposed progression and salary update immediately applies the changes to the worker's assignment and salary records.

### Automatic

The process automatically applies the proposed progressions and salary updates to the worker's assignment and salary records. You can review the updates, but you can't take any action.

## Applying Progression Rules: Examples

You can use progression rules to enable or restrict progression between grades and steps. You associate the rules with progression grade ladders using the Manage Progression Rules tab of the Create or Edit Progression Grade Ladder page. You define the rules using the Manage Eligibility Profiles task. For progression rules, create participant profiles with either Global or Compensation profile usage.

The following scenarios show at what level you apply various rules to enable or restrict progression by:

- Time at certain grades and steps
- Performance rating level
- Ineligible for progression due to rule

### Time at Certain Grades and Steps

You want factory workers to progress automatically through steps. You create a grade ladder with step-level rules that define how much time must elapse between progressions. The following table shows how you apply rules within the ladder.

Position	Example Rule
Grade Ladder	Active Workers Only
Grade	Job Assembly II
Step 1	Six Months in a Step
Step 2	Six Months in a Step
Step 3	Six Months in a Step

### Performance Rating Level

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

Position	Example Rule
Grade Ladder	Active Workers Only
Grade	Administrative Clerk I

Position	Example Rule
Step 1	Six Months in a Step
Step 2	Six Months in a Step
Step 3	Six Months in a Step Meets or Exceeds Evaluation

## Ineligible to Progress Due to Rule

You want programmers to not progress to the next step level unless they've received a technical certificate. You create a grade ladder that requires a certificate to proceed to the next step. The following table shows how you apply rules within the ladder.

Position	Example Rule
Grade Ladder	Active Workers Only
Grade	Programmer III
Step 1	Java SE Fundamentals Certificate
Step 2	Java SE Advanced Certificate
Step 3	Java SE Optimization Certificate

### Related Topics

- [Eligibility Profiles: Explained](#)

## Proposed Progression and Salary Updates: Explained

After you run the Run Grade Step Progression process, you can review the updates on the Review Proposed Progressions and Salary Updates page. The table displays workers with proposed progressions and the status of that proposal.

### Statuses

The following table describes the meaning of each processing status:

Status	Meaning
Accepted	The process applied the proposed progressions and salary updates to the assignment and salary records. You can't change this status.
Not Processed	The process evaluated the progression and determined the worker is eligible to move to the new grade or step.
Failed	The service that was writing the update to the assignment or salary record encountered a problem. You can try again to accept the update by manually clicking <b>Accept</b> .
Suspended	This status appears on older batch process runs that contain rows that were in Not Processed status when a subsequent process was run. You can no longer act on them in the older run.
Rejected	Someone stopped the process from applying the proposed updates to the worker's records. For example, you might reject a proposed progression and manually adjust the progression because the worker is eligible for multiple steps within a grade.

## Actions

Actions are available only if the progression grade ladder confirmation type is Manual.

You can accept the updates for workers individually or as a group. Accepting a proposed progression and salary update immediately applies the following for the selected workers:

- A new grade or step to the worker's assignment
- A new salary amount to the worker's salary record

You can reject proposed progressions and salary updates for workers individually or as a group. If you reject a proposal and then change your mind, you can undo the action and set the proposal back to not processed.

You can also reject proposed progressions and salary updates for selected workers within a group, and then accept updates for the remaining workers.

## FAQs

### Can I delete a progression grade ladder?

Yes, if you haven't associated any workers with the ladder.



# 9 Individual Compensation Plans

## Overview

Application implementation managers and compensation administrators use the Individual Compensation task list in the Compensation work area to define Individual compensation and personal contribution plans. Tasks include:

- Configuring compensation plans, payroll elements, HR actions, and other objects to allocate off-cycle compensation to individuals or for personal savings and charitable contributions
- Adding payroll elements used in these plans to compensation history

## Plans: Explained

Individual compensation plans define compensation that managers can award to individual workers outside of the regular compensation cycle, such as a spot bonus or education reimbursement. They also enable workers to manage their own contributions to charitable or savings plans. Create individual compensation plans using the Manage Plans task.

The following components comprise the details of a plan:

- Options
- Payroll elements and input values for each option
- Budget pool for each option
- Payment dates
- Eligibility
- Plan access restrictions
- Instruction text

## Options

Each plan must have at least one option with which you associate:

- Payroll element details to communicate the payment or distribution details to the payroll processing application
- Optional eligibility requirements to limit who's eligible for the plan

Examples:

- A company car plan has options consisting of different compensation amounts for each vehicle model.
- A spot bonus plan has options consisting of different fixed monetary amounts.

You can associate each:

- Option with only one payroll element and input value
- Payroll element with only one plan and option

## Payroll Elements and Input Values for Each Option

When you set up an element, you configure input values that determine the following:

- Compensation information that managers must enter when they award compensation under the plan
- Data that workers must enter when managing their own contributions in a plan
- Default values that aid managers or workers with data entry

Example: You configure an input value to enter the vehicle mileage when issued for a company car plan.

## Budget Pool for Each Option

Link to a workforce compensation budget pool so that managers can track off-cycle and on-cycle awards. When they allocate individual compensation, they can see:

- Amounts given from the linked individual compensation plan
- How those amounts reduce a manager's workforce compensation budget

## Eligibility

Eligibility profiles control in which compensation plans or options a particular worker is entitled to participate. If adding multiple profiles, you must mark at least one as required. You can attach eligibility profiles to:

- A plan
- An option
- Both a plan and an option

Examples:

- Attach an eligibility profile to the company car plan to include only the sales department.
- Attach additional eligibility profiles to the vehicle model options to restrict luxury models to only executive positions.

Compensation eligibility evaluation processing also uses criteria defined at the element eligibility level to determine whether a person is eligible for a compensation plan. The best practice is to control eligibility either with eligibility profiles or through the element eligibility and not to mix the two methods.

## Payment Dates

Select from standard date rules that:

- Specify when plan payments start (and end for recurring compensation)

Example: Next payroll period start date

- Enable the manager or worker to enter start or end date

## Plan Access Restrictions

Set critical plan access restrictions that control which users can initiate, update, or discontinue allocations in the individual compensation plan and under what circumstances.

## Instruction Text

You can compose optional instruction text to assist managers or workers using the plan as well as include hyperlinks to relevant documents and Web sites.

## Plan Access and Actions: Critical Choices

Plan access restrictions control the situations in which a line manager or worker can create, update, or discontinue allocations or contributions under an individual compensation plan. When you create an individual compensation plan you specify restriction details by action.

### Whether to Restrict Access

The first decision you make on the Plan Access tab is whether to restrict access to the plan. Use the **No** option with caution. For example, if you don't restrict access to a bonus plan, then individual workers could manage the bonus plan for themselves in their portrait. You would rarely select this option.

Restrict Access	Result
No	This plan becomes available to line managers and workers on all pages where you manage individual compensation or personal contributions.
Yes	To complete the plan access configuration, you must further define the restriction by selecting and adding actions and specifying any time constraints.

### Restriction by Action

If you decide to restrict access, you must select at least one action. For each action added, you must specify the period in which the user can start, update, or discontinue allocations or contributions.

Important action options include:

- Specific HR actions
- Manage Individual Compensation
- Manage Contributions
- All

### HR actions

Select one or more HR actions in which this plan should be available to the line manager or HR specialist for eligible workers during the corresponding HR transaction. For example, add a transfer action to a moving allowance plan to make it available when transferring a worker.

## Manage Individual Compensation

Select this option to make the plan available to line managers in the Manager Resources Dashboard or Person Gallery, if the worker is otherwise eligible. The plans can be either related or unrelated to HR transaction. If you select other HR actions and don't select this option, the plan is available to the manager only within the selected HR action transaction.

The following table shows examples of the Manage Individual Compensation action usage:

Manage Individual Compensation Action Usage	Example
Plan is related to HR action	<p>The spot bonus plan has a hire action to make it available for a hiring bonus while in the hire transaction.</p> <p>Add the <b>Manage Individual Compensation</b> action to provide alternative access to the spot bonus plan for use as a hiring bonus.</p>
Plan is unrelated to HR actions	<p>The <b>Manage Individual Compensation</b> action enables managers to use the spot bonus plan for special recognition, such as rewarding individuals for an important achievement or contribution.</p>

## Manage Contributions

Select this option if the plan is a worker contribution plan, such as a savings or charitable contribution plan. Also, specify additional access details, such as a restricted period for enrolling in, modifying, or discontinuing the plan. This action makes the plan available to eligible workers in their portrait.

Don't select any additional actions for a worker contribution plan.

### All

Selecting this option is similar to not restricting access, except that you can specify access details that apply to all actions. This option consists of all actions available in the list, including the **Manage Contributions** action, which makes the plan available to all workers who are otherwise eligible for the plan.

▲ **Caution:** Use this option with caution because it gives both workers and managers access to the plan. You would rarely select this option.

## Plans: Examples

You can use the Manage Plans task to create a variety of individual compensation plans for one-time or ongoing payments or contributions, for various purposes. The following scenarios illustrate some typical plans and provide tips on how to set them up.

## Spot Bonus

Scenario: Create a plan to make a one-time payment for a spot bonus.

Follow these steps:

1. Set up your payroll element to make a single payment of a manager-entered value.
2. Process the payroll element once per payroll period.
3. Specify a payment start date and leave the end date blank to indicate this is a one-time payment.
4. Add an eligibility profile to constrain the plan (optional).

Example: Use derived factors to identify full-time employment for a minimum of one year length of service.

5. Restrict access:
  - By HR action, select desired actions related to hiring, adding, and promoting workers.
  - Add the **Manage Individual Compensation** action to enable managers to award the bonus through the Person Management and Manager Resources Dashboard.

## Car Allowance

Scenario: Create a plan with two options for ongoing car allowance payments.

Example: Regional sales managers are eligible for a car allowance based on the radius of their territory from headquarters. The following table shows the different setup for two plan options:

Radius from Headquarters	Monthly Allowance	Option Setup
Less than or equal to 100 miles	300 USD	Recurring payroll element for territories with a radius of less than or equal to 100 miles and an input value of 300 USD
Greater than 100 miles	500 USD	Recurring payroll element for territories with a radius greater than 100 miles and an input value of 500 USD.

Setup that is common to both plans:

1. Process the payroll elements once a month.
2. Enable the manager to enter start and end dates based on an agreement with the worker. For example, Payment might start on the first of the month or the first payroll period following a promotion and end in one year.
3. Attach an eligibility profile that restricts eligibility to individuals with the Regional Sales Manager job.
4. Select actions related to hiring, adding, promoting, and transferring workers, to restrict access by HR action.
5. Add the **Manage Individual Compensation** action to enable managers to award or update the car allowance through the Person Management and Manager Resources Dashboard.

 **Tip:** You can add instructions to inform managers of the policy of payment based on radius.

## Worker Charity or Savings

Scenario: Create a plan that workers use to manage their own contributions.

Follow these steps:

1. Set up a plan option for contributions of either amount or percentage.
2. Set up a payroll element with a corresponding input value of either a flat amount or percentage to contribute per payroll period.
3. Enter a start date, typically 1 January of the next calendar year or after open enrollment.
4. Select **Manage Contributions** as the access action to make the plan available to workers to manage. You can define periods where workers can enroll for the first time, update existing contributions, or discontinue contributions. For example, Enable workers to always create new allocations while restricting allocation updates and discontinuations to a specified period, such as an open enrollment period of 15-30 November.
5. Add any instructions necessary to assist workers with the specific plan policies.

## Tracking Off-Cycle Compensation Against a Budget: Procedure

Associate a workforce compensation plan budget pool with the individual compensation plan.

1. Minimally set up the workforce compensation plan using the Manage Plans task.
  - a. Create the workforce compensation plan.
  - b. Configure the workforce compensation plan details.
  - c. Configure the workforce compensation budget pool.
  - d. Create at least one worksheet compensation component and associate the budget pool with it.
  - e. Run the Start Compensation Cycle process.
2. After you start the compensation cycle, associate the budget pool with an individual compensation plan option on the Create or Edit Option dialog box.

You can proxy to the Workforce Compensation work area from the Compensation work area. There you can manually give a budget to someone or use the Budget Pools page to distribute budgets to multiple managers. You can also automatically publish budgets, just as you do for a standard compensation cycle.

## FAQs

### Why can't I add an action to restrict access to a plan?

When **All** is currently selected as the action value on the Create Individual Compensation Plan page, Plan Access tab, the **Add** action is disabled. To make the plan available only for specific HR actions, replace the value of **All** by selecting a specific action. After selecting the first HR action, you can add rows and select additional actions. Specify access details for each individual HR action that you select.

Use the **All** option with caution because it gives both workers and managers access to the plan. You would rarely select this option. After you replace the value of **All**, the plan is available only in the transactions that you select.

## What's the difference between plan access restriction and role-based security?

Role based security determines access to the work area where individual compensation can be awarded or updated.

Restriction by HR action provides a more granular way to control when users can add, edit, or delete individual compensation under the plan based on the HR action.





# 10 Compensation History

## Categories: Explained

This topic describes the four compensation history summary table categories: Salary, Stock, Other Compensation, and Recurring Payments. The compensation history summary table shows, by category, all included compensation given to a worker, with links to detailed compensation allocation information. The summary displays five years of compensation history and the detail views display all years of compensation history.

### Salary

The following table shows the three rows of information for the Salary category.

Row	Comments
Overall Salary	For the current year, it's the most recent pay rate, shown in the frequency of the worker's salary basis (such as hourly, monthly, or annually).  For previous years, it's the pay rate on 31 December of the given year.
Annualized rate	Calculated using the worker's overall salary and the annualization factor of the salary basis frequency as of 31 December of the given year.
Percentage change	The difference in the worker's overall salary from the previous year, if history exists.

In the summary table, click the base pay hyperlink to view detailed information about salary history, percentage change, compa-ratio, and growth rate. The detail view includes links to individual base pay change records.

### Stock

The Stock category displays a total for each grant type awarded in the unit granted, such as shares or options. In the summary table, click the grant name to view information about grant date and price; granted, vested, and unvested shares; and the estimated value of unvested shares as well as to access further details.

### Other Compensation

The Other Compensation category displays nonrecurring monetary compensation such as commissions, bonuses, overtime, and reimbursable expenses. In the summary table, click the compensation name to view effective date, amount, currency, and grand total information about all awards.

### Recurring Payments

The Recurring Payments category includes the latest amount of recurring compensation, such as car allowances and education assistance. In the summary table, click the payment name to view effective date, amount, currency, and grand total information for an individual award or compensation amounts

## Configuring Summary Table: Explained

This topic explains how to configure the data that the compensation history summary table displays in four categories: Base Pay, Other Compensation, Stock, and Recurring Payments.

- Compensation history automatically displays base pay and stock grants.
- You must add other compensation and recurring payments data to history.

## Automatic Compensation History Setup

Compensation history automatically retrieves for the Salary and Stock categories, respectively:

- Base pay history from the salary table
- Stock share grants from the stock table.

## Manual Compensation History Setup

Other Compensation groups one-time payments, such as bonuses. Recurring Payments groups nonbase pay distributions such as allowances or tuition reimbursements. To include compensation in the Other Compensation and Recurring Payments history categories:

1. Click the Manage Compensation History task.
2. Select the payroll element and input value to add.

The payroll element definition automatically supplies the remaining data and determines the history category based on the recurrence of the payroll element.

## Managing Stock Grants in the Integrated Workbook: Procedure

You can generate the integrated Microsoft Excel workbook in which you import stock grants. Use the integrated workbooks to enter the stock grant data and upload into the application database

The basic process for importing stock grants using the integrated workbook is:

1. Generate the workbook.
2. Enter stock grant data.
3. Upload edits.
4. Resolve errors.

Repeat these steps as many times as required to accommodate revisions.

## Generating the Workbook

In the Compensation work area:

1. In the Tasks panel tab, click **Manage Stock Grants**.
2. On the Search Results toolbar for the Manage Stock Grants page, click **Prepare Import Spreadsheet**.

## Entering Stock Grant Data

Enter the stock grant data provided by your supplier, ensuring that each row contains a unique Grant Date, Grant ID, and Grant Number. The workbook displays a symbol in the **Changed** field to mark the rows that you added.

 **Caution:** Don't delete or reorder any of the columns in the template. If you do, the upload fails.

## Uploading Edits

After you complete your edits, click **Upload** to load into the application those rows that are marked as **Changed**. The application doesn't upload edits in cells with a nonwhite background.

 **Caution:** Don't select the **Upload and then immediately download** option when prompted during an upload. This action causes the committed data to immediately download back into the workbook obscuring any errors that occurred during the upload.

To validate the changes, open the Manage Stock Grants page and search for and view the imported stock grant data.

## Resolving Errors

The upload process automatically updates the **Status** field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.


## Setting Up the Desktop Integration for Excel: Procedure

Desktop integrated Excel workbooks let you create or edit records that you can upload to the application. To use these workbooks, you must install a desktop client and set up Microsoft Excel.

### Prerequisites

Perform these prerequisites before you install the client.

- Make sure that you have:
  - Microsoft Excel 2007, 2010, 2013, or 2016 (32-bit recommended)
  - Microsoft Windows 7, 8.1, or 10
- If you're reinstalling the client and currently have a version older than 11.1.1.7.3 (4.0.0), then uninstall that Oracle ADF Desktop Integration Add-In for Excel client the same way you uninstall any program on your computer.

 **Tip:** You can find the version in the control panel where you uninstall programs, or in the About dialog box in Excel.

- Optionally install the following from the Microsoft web site.
  - Microsoft .NET Framework 4.5.2
  - Microsoft Visual Studio 2010 Tools for Office Runtime (VSTO Runtime)

The desktop client installer does check if you have these already, and would download and install them if needed. But, you can manually install them first, especially if you run into issues installing them as part of installing the desktop client.

## Installing the Desktop Client

Install the Oracle ADF 11g Desktop Integration Add-In for Excel, which is a desktop client that lets you use the integrated workbooks that you download from the application.

1. Make sure you are signed in to your computer with your account. For example, you can't have someone else sign in as an administrator and make the installation available for everyone using your computer.
2. In the application, look for the client installer under **Navigator - Tools**. If it's not there, then ask your help desk where you can find the installer.
3. Run the installer (**adfdi-excel-addin-installer.exe**) as you would any program that you install on your computer.

## Setting Up Microsoft Excel

Integrated workbooks can have buttons within the worksheet, which you click to perform an action, for example to upload the worksheet. If you use any workbook with such buttons, then perform the following steps in Microsoft Excel only once, even if you reinstall the desktop client.

1. Click the **Microsoft Office** button, and click the **Excel Options** button.
2. In the Excel Options dialog box, select the Trust Center tab, and click **Trust Center Settings**.
3. In the Trust Center dialog box, select the Macro Settings tab, and select the **Trust access to the VBA project object model** check box.

 **Note:** The exact steps can vary depending on your version of Microsoft Excel.


## Using Desktop Integrated Excel Workbooks: Points to Consider

Where available, you can download a desktop-integrated Microsoft Excel workbook and use it to create or edit records. Your edits in the workbook don't affect the application until you upload the records back into the application. As you work, keep in mind the following points.

## What You Must Not Do

To ensure that you successfully upload to the application, don't:

- Rename text from the integrated workbook, for example the worksheet or tab names.
- Add columns.
- Delete any part of the template, for example columns.
- Hide required columns and status columns or headers.

 **Caution:** Avoid using the Windows Task Manager and clicking **End Task** to close Excel. Doing so might disable the add-in.

## Conventions

Some column headers in the integrated workbook might include **[..]**. This means that you can double-click or right-click within any cell in the column to open a dialog box, which lets you select a value to insert into that cell.

## Statuses

Depending on the workbook you're using, you can find statuses within the worksheets or in the Status Viewer. Within the worksheets, you might find statuses for:

- **Worksheet:** The status in the header area applies to the entire worksheet, or tab, within the integrated workbook.
- **Table:** The status applies to only the corresponding table.
- **Row:** The status applies to the state of the row within the workbook, not to the record itself. For example, if an expense item row has an error status, that error applies to the upload or validation of the data in that row. It's not a status for where the expense item is at in its life cycle..

You can usually double-click on all three types of statuses to see details on any errors.

To use the Status Viewer:

1. Open the tab for your task in the Ribbon, if available. For example, if you downloaded a workbook to create expense items, the tab is called Create Expense Items.
2. Click **Status Viewer**.
3. In the worksheet, click any table row to see the status of the row, including messages for any errors. The Status Viewer always shows the status of the entire worksheet.

## Searches

Some integrated workbooks have searches. To search within the workbook, sign in to the application first if you haven't already. In the Ribbon tab for your task, if available, click **Login**.

## Refreshes After Upload

If your changes aren't reflected after an upload, refresh the table in the application by:

- Using the refresh option for the table
- Applying a filter or search on the table

### Related Topics

- Using Tables: Explained

## Troubleshooting the Desktop Integration for Excel: Procedure

The application is integrated with Microsoft Excel so that, where available, you can work with records in a desktop integrated workbook. You might run into issues with the integration, for example, if you can't open the workbook that you downloaded or the workbook doesn't look right.

### Verifying the Version of Your Desktop Client

First, check the version of your Oracle ADF 11g Desktop Integration Add-In for Excel client.

1. Find Oracle ADF 11g Desktop Integration Add-In for Excel in the control panel where you uninstall programs on your computer, and see the **Version** column. Or, open the About dialog box in Excel, for example by doing one of the following:
  - Without opening a desktop integrated workbook, click the Microsoft Office button in Excel, select **ADF Desktop Integration**, and then select **About Oracle ADF 11g Desktop Integration**.
  - With a desktop integrated workbook open, click the Ribbon tab named after the task you're doing in the workbook, if available. Click **About**, and open the Versions tab, and see the version for the ADF Desktop Integration component.
2. Ask your help desk if you need to reinstall the client, due to the version you're on.

### Using the Client Health Check Tool

Use the health check tool to find out what integration issues you might have and how to resolve them. Ask your help desk if you are unable to find or use the tool.

1. Open a desktop-integrated workbook, and note down the URL in the Connect dialog box.
2. In a web browser, open the URL and click the **Run client health check tool** link to download the tool.
3. Run **ClientHealthCheck.exe** as you would other programs on your computer, and review the result for each checked item.
4. Select any item that has a problem, and read the help text.
5. Fix some of the problems by clicking the **Fix Problems** button. Otherwise, follow the instructions in the help text.
6. If you need more assistance, click the **Save Report As** button to prepare information for your help desk.
7. Review the report and remove any sensitive information.
8. Contact your help desk and provide your report.

### Reenabling the Add-In

In some cases, the desktop integration add-in for Excel can become disabled. If you have the right version installed, but the add-in isn't working and you're not using the health check tool, then try the following:

1. Click the **Microsoft Office** button, and click the **Excel Options** button.

2. Select the Add-Ins tab, and check which list the **Oracle ADF 11g Desktop Integration Add-in for Excel** is in.
3. If **Oracle ADF 11g Desktop Integration Add-in for Excel** is in the **Disabled Application Add-ins** list:
  - a. Select **Disabled Items** in the **Manage** field and click **Go**.
  - b. In the Disabled Items dialog box, select **Oracle ADF Desktop Integration Add-In for Excel** and click **Enable**.
  - c. Back in the Excel Options dialog box, select **COM Add-ins** in the **Manage** field and click **Go**.
  - d. In the COM Add-Ins dialog box, select **Oracle ADF 11g Desktop Integration Add-in for Excel**.
4. If **Oracle ADF 11g Desktop Integration Add-in for Excel** is in the **Inactive Application Add-ins** list, then perform only steps 3.3 and 3.4.
5. If **Oracle ADF 11g Desktop Integration Add-in for Excel** is in the **Active Application Add-ins** list, then contact your help desk.

 **Note:** The exact steps can vary depending on your version of Microsoft Excel.

## FAQs

### How can I import stock data sent to me by my supplier?

On the Manage Stock Grants page, use the **Prepare Import Spreadsheet** button to generate the stock table spreadsheet. Enter your supplier's data, ensuring that each row contains a unique Grant Date, Grant ID, and Grant Number. Upload the information into the stock table.





# 11 Workforce Compensation Plan Details

## Employment Records to Use: Points to Consider

The type of employment record selected for a plan determines the employment records evaluated by the start compensation cycle process and which records the compensation cycle uses. Use the Configure Plan Details page to select the employment records.

Determine the record to use by selecting one of the four options:

- Primary assignments
- All assignments
- Employment terms
- Any assignment or employment term with a salary

### Primary Assignments

The start compensation cycle process includes and evaluates eligibility for primary assignments only. If a worker has multiple assignments, the worker appears only on the primary assignment manager's worksheet, if the plan uses a manager hierarchy.

### All Assignments

The start compensation cycle process includes and evaluates eligibility for all assignments.

- If a worker has multiple assignments, the worker may appear on one manager's worksheet more than once.
- If the manager on each assignment is different, the worker may appear on multiple managers' worksheets.

### Employment Terms

The start compensation process includes and evaluates eligibility for employment terms of legal employers that use the three-tier employment model. If the plan uses a manager hierarchy, workers appear on the primary assignment manager's worksheet.

The process does not evaluate workers whose legal employer uses a two-tier employment model.

### Any Assignment or Employment Term with a Salary

The start compensation process includes and evaluates eligibility for all assignments with a salary record and employment terms with a salary record.

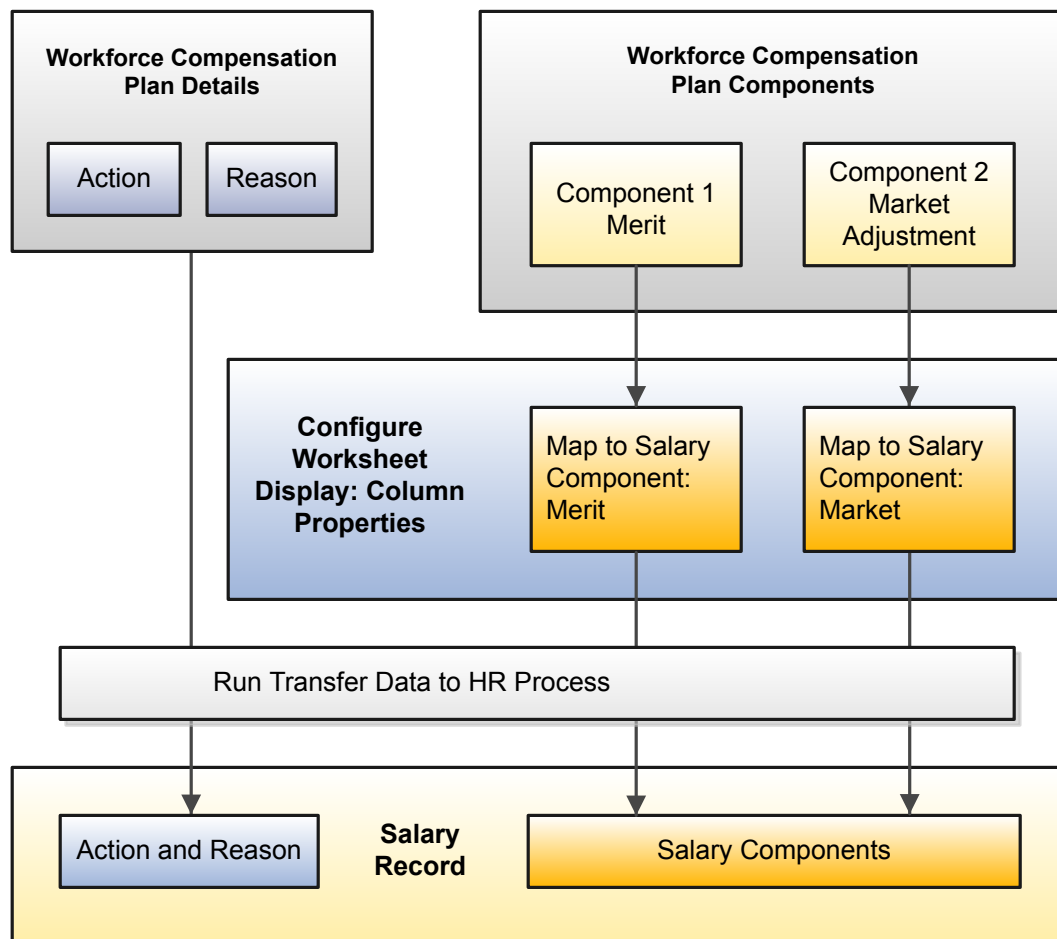
- If the plan uses a manager hierarchy, workers appear on the primary assignment manager's worksheet.
- If a worker has multiple assignments with a salary record, the worker may appear on one manager's worksheet more than once with a different base salary for each assignment.
- If the manager on each assignment is different, the worker may appear on multiple managers' worksheets with different salaries for each.

The process does not evaluate assignments and employment terms that don't have a salary record associated.

## Actions and Reasons, Salary Components, and Plan Components: How They Work Together

Salary components and plan components work with actions and reasons to classify compensation transactions.

This figure shows how the salary components and plan components work with actions and reasons to classify compensation transactions.



### Actions and Reasons in Workforce Compensation

When you set up a workforce compensation plan, you must select an action and optional action reason on the Configure Plan Details page. They're associated with all salary and assignment records when you transfer data to HR after the cycle is complete. Other HR transactions use the same action framework.

You have one action and ten action reasons to use with workforce compensation plans. You can extend this list to add additional actions and reasons.

The action provided is Allocate Workforce Compensation. Action reasons provided are:

- Anniversary
- Career Progression
- Cost of Living Adjustment
- Market Adjustment
- Mass Adjustment
- Merit
- Outstanding Performance
- Performance
- Periodic Review
- Promotion

Example: You set up a plan where managers allocate only merit increases during the compensation cycle, as follows:

- The action is Allocate Workforce Compensation.
- The action reason is Merit.

The batch process updates salary records after the compensation cycle is over. Now, the Allocate Workforce Compensation action and Merit action reason appears in the worker's history for that salary record.

## Actions and Reasons in Individual Compensation

Individual salary transactions also have an action and optional action reason associated with them. The action and action reason identify the reason for the salary adjustment.

Examples:

- You adjust the salary while promoting a worker or if a worker relocates.
  - The action is Transfer or Relocation.
  - The action reason is the same.
- A compensation or HR specialist adjusts a worker's salary:
  - The action reason is Change Salary.
  - The reason is Adjustment.

## Salary Components

You can itemize a worker's salary record using salary components. These salary components associate an adjustment amount with a specific reason.

The following table shows how a manager might determine a worker's salary adjustment.

Salary Component	Change Percentage	Change Amount (USD)
Merit	5	5,000

Salary Component	Change Percentage	Change Amount (USD)
Cost of Living Adjustment	2	2,000
Promotion	1	1,000
Total Adjustment	8	8,000

The worker's salary total salary increase is 8,000 USD and the salary record stores the itemization of that eight percent into the components shown.

The Salary Component lookup type contains some commonly used salary components. You can also add new components to the lookup at any time.

## Workforce Compensation Plan Components

When you create workforce compensation plans, you define up to five components that represent compensation awarded in the plan, and indicate whether they represent salary.

Plan components can be:

- The same type of compensation, such as Merit, Cost of Living Adjustment, and Market Adjustment, all of which adjust a worker's salary.
- Different types of compensation within the same plan, such as Salary, Bonus, and Stock.

## Optional Plan Component Mapping to Salary Components

Workforce compensation plan components are informational only. To transfer plan component itemization of salary adjustments to the salary records, you must map the plan components to salary components. Map plan components to salary components using the Element Mapping tab on the Configure Column Properties dialog box.

### Related Topics

- [Action Components: How They Work Together](#)
- [Salary Component Lookups: Explained](#)
- [Configuring Column Properties Element Mapping Tab: Points to Consider](#)

## Plan Statuses: Explained

Plan status identifies the state of the plan and any plan cycles already started or completed. Use the Configure Plan Details page to select the plan status. The two plan statuses are:

- Active
- Inactive

## Active Plan Status

The plan is available for use and you can start a plan cycle. Line managers can access the plan from the Workforce Compensation work area at any time during the period that the worksheet is available to managers. Compensation managers can access the plan from the Compensation work area to view plan data even after you transfer the data to HR.

## Inactive Plan Status

The plan is no longer available for use and isn't available to view or update. Compensation administrators can change the status back to Active from the Configure Plan Details page. Use this status to create and test plans, or for obsolete plans. You can purge only plans with this status from the system.

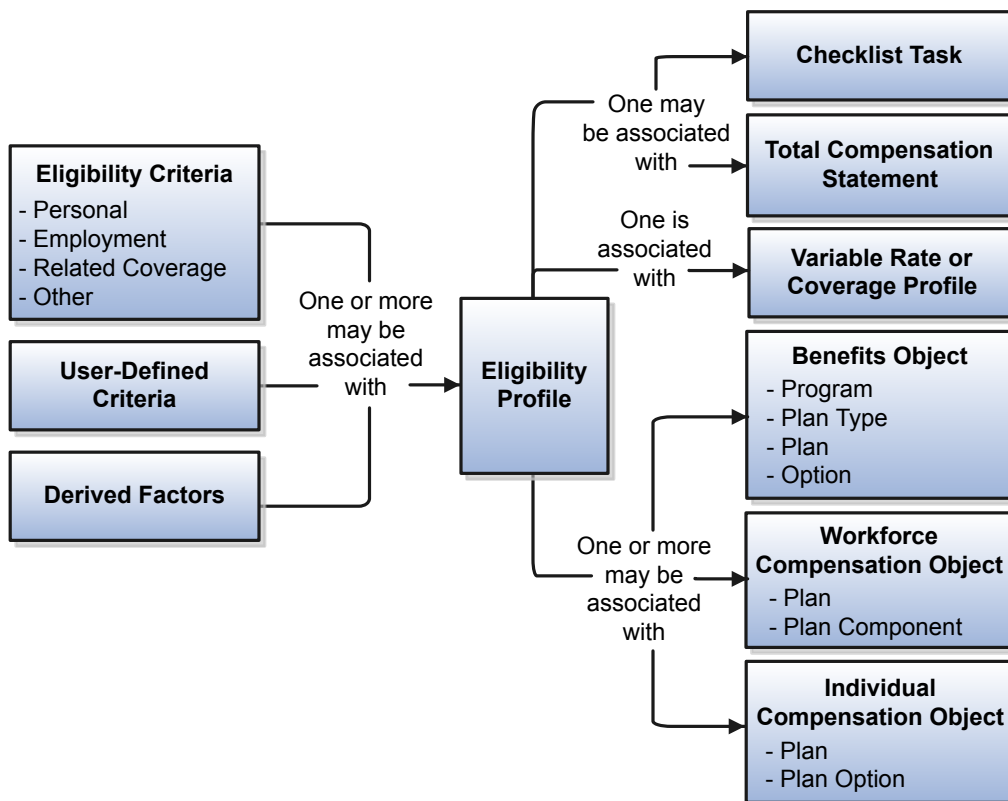


# 12 Plan Eligibility

## Eligibility Components: How They Work Together

You add eligibility criteria to an eligibility profile, and then associate the profile with an object that restricts eligibility.

The following figure shows the relationships between eligibility components.



### Eligibility Criteria

You can add different types of eligibility criteria to an eligibility profile. For many common criteria, such as gender or employment status, you can select from a list of predefined criteria values. However, you must create user-defined criteria and derived factors before you can add them to an eligibility profile.

### Eligibility Profile

When you add an eligibility criterion to a profile, you define how to use it to determine eligibility. For example, when you add gender as a criterion, you must specify a gender value (male or female) and whether to include or exclude persons who match that value.

## Associating the Profile with Objects

This table describes associating eligibility profiles with different kinds of objects and whether you can attach more than one profile.

More than One Profile?	Associated Objects	Purpose
No	Variable rate or variable coverage profile	Establish the criteria required to qualify for that rate or coverage
No	Checklist task	Control whether that task appears in an allocated checklist
No	Total compensation statement	Apply additional eligibility criteria after statement generation population parameters
Yes	Benefits object	Establish the eligibility criteria for specific programs, plans, and options
Yes	Compensation object	Establish the eligibility for specific plans and options
Yes	Performance documents	Establish the eligibility for performance documents
Yes	Goal plans or goal mass assignments	Establish eligibility for the goal
One or more	Absence plan	Determine the workers who are eligible to record an absence that belongs to that plan

### Related Topics

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

## Ineligible Workers: Points to Consider

When you configure workforce compensation plan eligibility, you can use two check boxes to track ineligible workers and hide them on the worksheet. Tracking and hiding are two different choices that work together to control how ineligible workers appear on the worksheet.



## Ineligible Worker Tracking and Hiding

These points describe what happens when you track ineligible workers:

- The application creates a worksheet record for workers found ineligible during the start workforce compensation or refresh process.
- The ineligible workers appear on the worksheet and the Administer Workers page in the Compensation work area.
- Ineligible workers are shown as **Ineligible** and all entry fields are not editable.
- Managers or administrators can request a worker's eligibility change.

When you don't track ineligible workers administrators must process the workers to include them in the plan. Whether or not you track ineligible workers, you can hide ineligible workers from the worksheet.

## Worksheet Effects

The following table shows how enabling and disabling the two check boxes affects which workers appear on the worksheet.

Track Ineligible Workers	Hide Ineligible Workers	Worksheet Effects
Enabled	Enabled	Workers found ineligible by the start workforce compensation or refresh process do not appear in the worksheet.  Eligible workers made ineligible mid-cycle drop off the worksheet.
Enabled	Disabled	Workers found ineligible by the start workforce compensation or refresh process appear in the worksheet.  Eligible workers made ineligible mid-cycle remain on the worksheet.
Disabled	Enabled	Workers found ineligible by the start workforce compensation or refresh process do not appear in the worksheet.  Eligible workers made ineligible mid-cycle drop off the worksheet.
Disabled	Disabled	Workers found ineligible by the start workforce compensation or refresh process do not appear in the worksheet.  Eligible workers made ineligible mid-cycle remain on the worksheet.

## FAQs

## What happens if I track ineligible workers?

The worksheet displays ineligible workers but managers can't allocate compensation, promote workers, or rate worker performance. Managers or administrators can change an ineligible worker's status to eligible.

If you also select to hide ineligible workers, then the worksheet doesn't display the ineligible workers on the worksheet.

You select to track, show, or hide ineligible workers on the Configure Eligibility page.

## What happens if I include recently terminated workers in the Start Compensation Cycle process?

Terminated workers appear on the worksheet if their termination date is between the cycle evaluation start date and the HR data extract date and you don't hide ineligible workers. They must also meet the plan eligibility requirements. Individuals who don't meet these criteria aren't included on the worksheet or in the Start Compensation Cycle process if you don't track ineligible workers. You select to hide ineligible workers on the Configure Plan Eligibility page.

## What happens if my eligibility requirements are different for the components than for the plan?

The application evaluates the plan-level eligibility before component level eligibility.

- A worker must be eligible for the plan to be eligible for a component.
- Each component can have distinct eligibility requirements.
- A worker who is eligible for the plan might or might not be eligible for one or more components in the plan.

You configure eligibility on the Configure Plan Eligibility and Configure Compensation Components pages.

## What happens if I don't select the Required option when I add an eligibility profile to an object?

If you add only one eligibility profile to an object, then the criteria in that profile must be satisfied, even if the **Required** option isn't selected.

If you add multiple eligibility profiles, the following rules apply:

- If all profiles are optional, then at least one of the profiles must be satisfied.
- If all profiles are required, then all of the profiles must be satisfied.
- If some but not all profiles are required, then all required profiles must be satisfied and at least one optional profile must also be satisfied.

# 13 Plan Cycles

## Plan Cycle Dates: Explained

Plan cycle dates are the dates within a workforce compensation plan cycle that determine a variety of aspects, such as access and eligibility. A plan can have multiple plan cycles, each with a unique set of dates. You can configure several dates for a plan cycle using the Create or Edit Plan Cycles dialog box. The following table describes the plan cycle dates.

Date	Description
Evaluation Period Start and End	<p>Period in which you evaluate compensation.</p> <p>The dates appear in the hover window when you mouse over the plan name on the Compensation Plans page. Informational only.</p>
Plan Access Start and End	Period in which managers can see active plans in read-only mode.
Worksheet Update Period Start and End	Period in which managers can update active plans.
HR Data Extraction	Date as of which the application initially extracts person and assignment data from HR and places it in the compensation tables for use during the compensation cycle.
Eligibility Determination	Date on which the application evaluates workers' records for eligibility.
Currency Conversion	Date as of which the application obtains conversion rates from the GL daily rates table to convert monetary amounts into different currencies.
Performance Rating	<p>Date to use for compensation performance ratings.</p> <p>Using the same date in multiple plans makes the same ratings available to all of those plans when managers give compensation performance ratings.</p>
Default Promotion Effective	<p>Date on which job, grade, and position changes take effect.</p> <p>Using the same date in multiple plans makes the promotions available to all of those plans when managers promote workers. Managers can override this date in the worksheet or you can set the date when running the Transfer Data to HR process.</p>
Default Due	<p>Date by which all managers are to submit their worksheets. Informational only.</p> <p>Configure different dues dates by hierarchy level. Optionally you can notify managers when a date changes.</p>

## Promotion Effective Date: Explained

You can define a default effective date for all workers promoted through a workforce compensation plan. You can enable managers to override the default date for individual workers they promote during the compensation cycle. The application uses the default effective date to obtain:

- New salary range
- New compa-ratio
- Other new salary metrics when a promotion involves a change to a worker's grade

To define the Promotion Effective Date configure the following:

- Default promotion effective date for the plan cycle
- Worksheet column properties of the **Promotion Effective Date** column

### Default Promotion Effective Date for the Plan Cycle

When you set up a plan, you configure the default promotion effective date using the Create Plan Cycles dialog box. The **Promotion Effective Date** column uses this default date for all workers in the worksheet.

### Worksheet Column Properties of the Promotion Effective Date Column

You can display the **Promotion Effective Date** column in the worksheet. When you configure the column properties for the **Promotion Effective Date** column using the Configure Column Properties dialog box you can:

- Enable managers to override the default date for individual workers they promote during the compensation cycle.
- Specify whether the Promotion Effective Date column is subject to refresh by the Refresh Data process. The following table compares the refresh results when the promotion effective date column is subject to refresh and when it's not:

Subject to Refresh	Description of Refresh Processing
Yes	<ul style="list-style-type: none"> <li>a. A manager overrides the default promotion effective date.</li> <li>b. The Refresh Data process changes the worksheet column date back to the default promotion effective date set for the plan cycle.</li> <li>c. The process then uses the date to refresh the new salary metrics.</li> </ul>
No	<p>The Refresh Data process uses the date in the worksheet column to refresh the new salary metrics. The date in the worksheet column is either:</p> <ul style="list-style-type: none"> <li>○ Default promotion effective date for the plan cycle</li> <li>○ Manager's overriding date</li> </ul>

#### Related Topics

- [Refresh Data Process: Points to Consider](#)
- [Configuring Column Properties: Explained](#)

# 14 Hierarchies

## Matrix Hierarchies: Explained

You can create up to three hierarchies for a workforce compensation plan that enable multiple managers to have insight and input into a worker's award during a workforce compensation cycle. You define hierarchies on the Configure Hierarchies page when you create a workforce compensation plan.

### Hierarchies

Hierarchies determine how the application decides who are primary worksheet managers and which workers appear on their worksheets. For the primary hierarchy, it also determines how budgets roll down and approvals are routed. The primary hierarchy is the main hierarchy of worksheet managers. The secondary and the review hierarchies give other people access to the same set of workers to give feedback and propose allocations. They are optional hierarchies.

### Worksheet Actions

The following table shows what actions are available to the managers on the worksheet for each hierarchy:

Hierarchy	Actions Available
Primary	<p>Primary worksheet managers can:</p> <ul style="list-style-type: none"> <li>• Accept or overwrite secondary manager or other reviewer proposals</li> <li>• Allocate compensation</li> <li>• Approve worksheets</li> <li>• Submit worksheets</li> <li>• Allocate budgets</li> <li>• Model compensation</li> </ul>
Secondary	<p>Secondary managers can:</p> <ul style="list-style-type: none"> <li>• View compensation information</li> <li>• See subordinate workers down the hierarchy</li> <li>• Propose allocations</li> <li>• Save allocations</li> </ul>
Review	<p>Other reviewers can:</p> <ul style="list-style-type: none"> <li>• View compensation information</li> <li>• Only see direct reports</li> <li>• Propose allocations</li> <li>• Save allocations</li> </ul>

If a manager doesn't have a secondary managed plan or other plan to review, those regions don't appear on the Compensation Plans page.

## Examples

Some examples of matrix hierarchies are:

Matrix Hierarchy	Purpose
Country-based Primary Hierarchy and a Secondary Hierarchy	Enables country leaders to manage the budget and allows line managers to manage the compensation for their organization.
Secondary Hierarchy	Gives a dotted line manager access to a worker's compensation if the worker completed a project for the manager.
Review Hierarchy	Gives an India HR specialist access to all eligible India workers regardless of who is their primary worksheet manager.

### Related Topics

- [What's the difference between primary worksheet managers, secondary managers, and other reviewers?](#)

## Configuring Matrix Hierarchies: Points to Consider

You can create up to three hierarchies for a single compensation plan to give multiple managers different levels of access to the same workers. For each hierarchy you specify the source of the reporting structure, error handling, and default access levels. Use the Configure Hierarchies page to configure these matrix settings:

- Source
- Missing Manager Handling
- Missing Relationship Records
- Default Access Level

## Source

You select a reporting structure to build the worksheet for each hierarchy. You must select a source for the primary hierarchy even if you don't enable a secondary or review hierarchy. Select one of the five options shown in the following table:

Options	Description
<b>Primary Manager Hierarchy</b>	The primary worksheet manager associated with the worker's assignment record determines the hierarchy.
<b>Other Manager Hierarchy</b>	Another manager type associated with the worker's assignment, such as project manager or resource manager, determines the hierarchy.
<b>Formula</b>	A custom hierarchy created using a fast formula determines the hierarchy.
<b>Position Tree</b>	The structure of the position tree determines the hierarchy.

Options	Description
<b>Department Tree</b>	The manager defined for a department tree determines the hierarchy.

## Missing Manager Handling

You can specify how to handle a worker who does not have a manager by selecting one of these values:

- Leave blank (compensation administrator fixes manually)
- Use primary manager
- Search tree until found (available when you select position or department tree)

## Missing Relationship Records

You can record missing relationships in the Start Compensation Cycle and Refresh Compensation Data process log files. When you select this option, the processes then include hierarchy breaks in the log files.

Examples of hierarchy breaks are when a worksheet manager doesn't have a manager or a worker doesn't have a primary line manager on their assignment. You want to correct the condition so that worksheets roll up properly and include all eligible workers.

## Default Access Level

You decide the update and access levels for managers by selecting a default access level or by using a formula. You might use a formula when you want different sets of managers to have different access. For example, you use the standard manager hierarchy to build the hierarchy, but only enable Grade M4 and higher managers to have access to update. All other managers have no access.

Select one of these access levels:

- Updates allowed
- No updates allowed
- No access

### Related Topics

- [Compensation Hierarchy Determination Formula Type](#)
- [Using Formulas: Explained](#)
- [Oracle Fusion HCM Trees: Explained](#)

## Hierarchy Determination Formula Type

The Compensation Hierarchy Determination formula determines the hierarchy for an associated workforce compensation plan. You select the formula on the Configure Plan Details page.

## Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED
- EFFECTIVE\_DATE
- HR\_ASSIGNMENT\_ID
- END\_DATE
- START\_DATE
- HR\_TERM\_ID
- JOB\_ID
- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE
- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID
- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

## Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

## Input Variables

The following input variables are available to formulas of this type.

Input	Data Type	Required	Description
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_COMPONENT_ID	Number	Y	Component ID
CMP_IV_PERSON_ID	Number	Y	Worker ID
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End Date
CMP_IV_PLAN_EXTRACTION_DATE	Date	Y	Plan Extraction Date



Input	Data Type	Required	Description
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date
CMP_IV_PERFORMANCE_EFF_DATE	Date	Y	Performance Effective Date
CMP_IV_PROMOTION_EFF_DATE	Date	Y	Promotion Effective Date
CMP_IV_XCHG_RATE_DATE	Date	Y	Currency Conversion Date

## Return Values

The following return variables are available to formulas of this type.

Return Value	Data Type	Required	Description
L_PERSON_ID	Number	Y	Person ID of manager
L_ASSIGNMENT_ID	Number	Y	Assignment ID of manager

Or

Return Value	Data Type	Required	Description
L_PERSON_NUMBER	Number	Y	Person number of manager

You receive the following error if the formula returns an invalid PERSON\_NUMBER and the application can't obtain the ASSIGNMENT\_ID:

Formula passed in an invalid person number <15465857>. Assignment ID could not be obtained.

## Sample Formula

This sample formula determines the manager of a person when the assignment\_id is passed.


```
/******  
FORMULA NAME : Compensation Hierarchy Determination Formula  
FORMULA TYPE : Compensation Hierarchy Determination  
DESCRIPTION: Hierarchy determination fast formula which is based on assignment_id  
*****/  
  
/*===== INPUT VALUES DEFAULTS BEGIN =====*/  
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number)/*=====  
INPUT VALUES DEFAULTS ENDS=====*/  
  
/*===== FORMULA SECTION BEGIN =====*/  
DEFAULT FOR CMP_IV_ASSIGNMENT_ID IS 0  
L_PERSON_ID = '0' L_ASSIGNMENT_ID = '0'  
if (CMP_IV_ASSIGNMENT_ID = 100000008154060 ) THEN  
(  
L_PERSON_ID = to_char(-999) //-999 indicates top level
```

```
//Manager.  
L_ASSIGNMENT_ID = to_char(-999)  
)  
ELSE  
(  
L_PERSON_ID = to_char(100000008153756)  
L_ASSIGNMENT_ID = to_char(100000008154060)  
)  
  
RETURN L_PERSON_ID , L_ASSIGNMENT_ID  
  
/*===== FORMULA SECTION END =====*/
```

## Default and Override Formula Type

The Compensation Default and Override formula determines the default values populated in a column for a workforce compensation plan. When you configure the worksheet display for a column in the Configure Column Properties dialog box, Default Values tab, you can select this formula.

The following predefined formulas are available for the eligible salary column for this formula type.

 **Caution:** Use these formulas as samples for testing purposes only. Copy and create your own version of a formula for use in your own compensation plans. Modifying the sample formula might provide unexpected results upon upgrade.

Formula	Description
CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE	Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period.
CMP_ELIGIBLE_SALARY_PRORATION_MONTH_END_AVERAGE	Eligible salary calculated by averaging salary on the last day of each month in the workforce compensation cycle evaluation period. Uses salary on the last day of the evaluation period for midmonth evaluation end dates.
CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_NINETY_DAY_MIN	Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period. Returns zero for workers who worked fewer than 90 days.
CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_USING_FTE	Eligible salary calculated by averaging daily salary adjusted for part-time workers. Accounts for number days that a salary is in effect and FTE during the workforce compensation cycle evaluation period.
CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_FOR_JOBS	Eligible salary calculated by averaging salary for the number of days a worker holds a specific job code on the assignment. Accounts for the number of days that a salary is in effect during the workforce compensation cycle evaluation period.

## Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED

- EFFECTIVE\_DATE
- END\_DATE
- START\_DATE
- HR\_ASSIGNMENT\_ID
- HR\_TERM\_ID
- JOB\_ID
- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE
- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID
- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

## Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

## Input Variables

The following input variables are available to formulas of this type.

Input	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Unique numeric identifier for the workforce compensation plan
CMP_IV_PERIOD_ID	Number	Y	Unique numeric identifier for the fiscal calendar period
CMP_IV_COMPONENT_ID	Number	Y	Unique numeric identifier for the workforce compensation plan component
CMP_IV_ITEM_NAME	Char	Y	Name for the workforce compensation plan item
CMP_IV_PERSON_ID	Number	Y	Unique numeric identifier for the worker associated with the workforce compensation plan
CMP_IV_PLAN_START_DATE	Date	Y	Date on which the workforce compensation plan becomes active
CMP_IV_PLAN_END_DATE	Date	Y	Date on which the workforce compensation plan becomes inactive

Input	Data Type	Required	Description
CMP_IV_PLAN_ELIG_DATE	Date	Y	Date on which the workforce compensation plan becomes eligible
CMP_IV_PERFORMANCE EFF_DATE	Date	Y	Date to use for compensation performance ratings
CMP_IV_PROMOTION EFF_DATE	Date	Y	Date on which job, grade, and position changes take effect
CMP_IV_XCHG_RATE_DATE	Date	Y	Date on which the application obtains conversion rates from the GL daily rates table
CMP_IV_ASSIGNMENT_ID	Number	Y	Date to use for assignments

## Return Values

The following return variables are available to formulas of this type.

Return Value	Data Type	Required	Description
L_DEFAULT_VALUE	Number/ Char/Date	Y	Default value from the formula. The date should be in yyyy/mm/dd format
L_DATA_TYPE	Char	Y	Data type of the column

## Sample Formula

This sample formula determines the value of a column based on its item name.

```

/*****
FORMULA NAME : Compensation Default and Override Formula
FORMULA TYPE : Compensation Default and Override
DESCRIPTION : Defaults the value of a column based on its item_name
*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number), CMP_IV_COMPONENT_ID (number),
CMP_IV_ITEM_NAME (text)
/*===== INPUT VALUES DEFAULTS ENDS=====*/

/*===== FORMULA SECTION BEGIN =====*/

DEFAULT FOR CMP_IV_ITEM_NAME IS 'YYYYYYY'
L_DEFAULT_VALUE = to_char(0)
IF (CMP_IV_ITEM_NAME = 'AmountComp1') THEN
(
L_DEFAULT_VALUE = to_char(3333)
)
ELSE IF (CMP_IV_ITEM_NAME = 'AmountComp2') THEN

```

```
(  
L_DEFAULT_VALUE = to_char(7777)  
)  
ELSE  
(  
L_DEFAULT_VALUE = to_char(-999)  
)  
RETURN L_DEFAULT_VALUE  
  
/*===== FORMULA SECTION END =====*/
```



# 15 Compensation Budgets

## Initiating Budgets: Points to Consider

You can distribute initial budgets for one or more managers in the hierarchy three ways: Initiate budgets manually, run the Start Compensation Cycle process, or use a model to distribute budgets. When a budget is zero or null, managers have read-only access to their budgets. A null budget contains no value. A zero budget means no amount is budgeted.

### Initiate Budgets Manually

You can initiate budgets manually on the Budget Pools page by:

- Switching to the manager whose budget you want to initiate
- Clicking the **Adjust Budgets** button

You can initiate budgets for the first time or adjust budgets previously initiated for a selected manager. The budget amount can be a flat amount or a percentage of total eligible salaries. The selected manager receives the budget amount you initiated or modified.

### Run the Start Compensation Cycle Process

When you create a budget pool you can select to automatically publish budgets. The Start Compensation Cycle process distributes budget amounts or budget percentages based on the default values you configured for the following columns on the Configure Budget Page Layout page:

- **Budget Distribution Amount** or **Budget Distribution Percentage** columns on the **Detail Table** tab
- **Budget Amount** or **Budget Percentage** columns on the **Summary Columns** tab
- **Budget Amount** or **Budget Percentage** columns on the **Worker List** tab for worker level budgeting

The following table shows how the Start Compensation Cycle process distributes budgets when budgets are automatically distributed.

Budgeting Method	Budget Distributed
Manager level budgeting	As amounts to all managers with at least one lower level manager under them.
Worker level budgeting	As amounts or percentages at the worker level. The manager level budgets are the sum of the individual worker budgets.

### Use a Model to Distribute Budgets

You can build a model or use an existing model to distribute budget amounts for the first time based on the model criteria. On the Preview Model Results page, you apply the results as budget amounts to all managers in the model population.

## FAQs

### What happens when a manager receives a zero or no budget?

The manager has read-only access and the available budget changes as follows:

- If there is no budget, then there is no available budget.
- If the budget is zero, then no amount is budgeted. The available budget becomes negative when you make allocations.

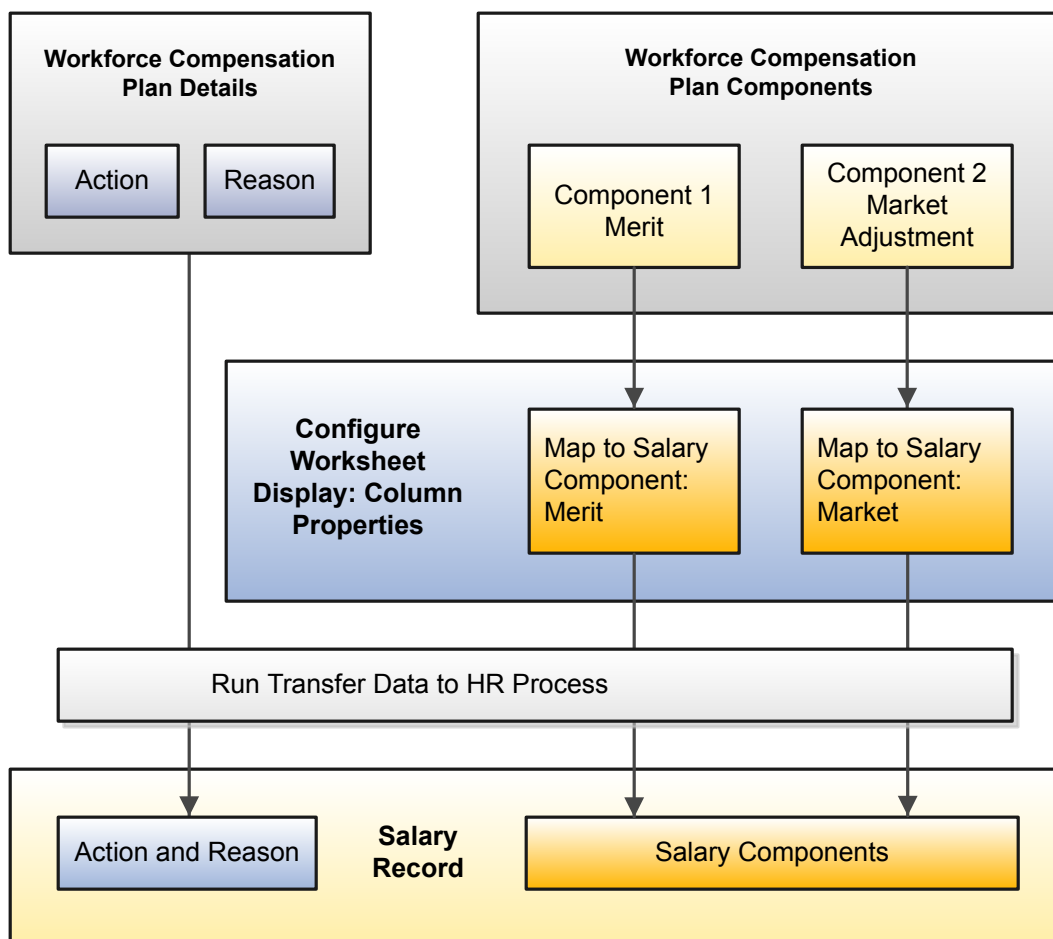


# 16 Compensation Components

## Actions and Reasons, Salary Components, and Plan Components: How They Work Together

Salary components and plan components work with actions and reasons to classify compensation transactions.

This figure shows how the salary components and plan components work with actions and reasons to classify compensation transactions.



## Actions and Reasons in Workforce Compensation

When you set up a workforce compensation plan, you must select an action and optional action reason on the Configure Plan Details page. They're associated with all salary and assignment records when you transfer data to HR after the cycle is complete. Other HR transactions use the same action framework.

You have one action and ten action reasons to use with workforce compensation plans. You can extend this list to add additional actions and reasons.

The action provided is Allocate Workforce Compensation. Action reasons provided are:

- Anniversary
- Career Progression
- Cost of Living Adjustment
- Market Adjustment
- Mass Adjustment
- Merit
- Outstanding Performance
- Performance
- Periodic Review
- Promotion

Example: You set up a plan where managers allocate only merit increases during the compensation cycle, as follows:

- The action is Allocate Workforce Compensation.
- The action reason is Merit.

The batch process updates salary records after the compensation cycle is over. Now, the Allocate Workforce Compensation action and Merit action reason appears in the worker's history for that salary record.

## Actions and Reasons in Individual Compensation

Individual salary transactions also have an action and optional action reason associated with them. The action and action reason identify the reason for the salary adjustment.

Examples:

- You adjust the salary while promoting a worker or if a worker relocates.
  - The action is Transfer or Relocation.
  - The action reason is the same.
- A compensation or HR specialist adjusts a worker's salary:
  - The action reason is Change Salary.
  - The reason is Adjustment.

## Salary Components

You can itemize a worker's salary record using salary components. These salary components associate an adjustment amount with a specific reason.

The following table shows how a manager might determine a worker's salary adjustment.

Salary Component	Change Percentage	Change Amount (USD)
Merit	5	5,000

Salary Component	Change Percentage	Change Amount (USD)
Cost of Living Adjustment	2	2,000
Promotion	1	1,000
Total Adjustment	8	8,000

The worker's salary total salary increase is 8,000 USD and the salary record stores the itemization of that eight percent into the components shown.

The Salary Component lookup type contains some commonly used salary components. You can also add new components to the lookup at any time.

## Workforce Compensation Plan Components

When you create workforce compensation plans, you define up to five components that represent compensation awarded in the plan, and indicate whether they represent salary.

Plan components can be:

- The same type of compensation, such as Merit, Cost of Living Adjustment, and Market Adjustment, all of which adjust a worker's salary.
- Different types of compensation within the same plan, such as Salary, Bonus, and Stock.

## Optional Plan Component Mapping to Salary Components

Workforce compensation plan components are informational only. To transfer plan component itemization of salary adjustments to the salary records, you must map the plan components to salary components. Map plan components to salary components using the Element Mapping tab on the Configure Column Properties dialog box.

### *Related Topics*

- [Action Components: How They Work Together](#)
- [Salary Component Lookups: Explained](#)
- [Configuring Column Properties Element Mapping Tab: Points to Consider](#)

## Local Currency Determination: Points to Consider

If you have global plans that pay workers in different currencies, specify the method of determining each worker's local currency for each component. Use the Configure Plan Currency page to select the currency from among the following.

- Corporate currency
- Element input currency
- Legal employer currency
- Salary basis currency

- [Formula](#)

## Local Currency Determination

The following table describes the currency options:

Currency	Description
Corporate	The corporate currency defined for the plan determines the local currency.
Element Input	The input currency of the payroll element mapped to the component determines the local currency.
Legal Employer	The currency defined by the worker's legal employer determines the local currency.
Salary Basis	The payroll element associated with the salary basis definition linked to the worker's employment record determines the local currency.
Formula	A formula you create to retrieve the currency from some other source determines the local currency.

### Related Topics

- [Using Formulas: Explained](#)
- [Compensation Currency Selection Formula Type](#)

## Currency Selection Formula Type

The Compensation Currency Selection formula determines the currency associated with a workforce compensation component. You select the formula on the Configure Compensation Components page.

### Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED
- EFFECTIVE\_DATE
- END\_DATE
- START\_DATE
- HR\_ASSIGNMENT\_ID
- HR\_TERM\_ID
- JOB\_ID
- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE
- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID

- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

## Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

## Input Variables

The following input variables are available to formulas of this type.

Input	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Plan ID
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERIOD_ID	Number	Y	Period ID
CMP_IV_COMPONENT_ID	Number	Y	Component ID
CMP_IV_PLAN_START_DATE	Date	Y	Plan Start Date
CMP_IV_PLAN_END_DATE	Date	Y	Plan End Date
CMP_IV_PLAN_EXTRACTION_DATE	Date	Y	Plan Extraction Date
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date
CMP_IV_PERFORMANCE_EFFECT_DATE	Date	Y	Performance Effective Date
CMP_IV_PROMOTION_EFFECT_DATE	Date	Y	Promotion Effective Date
CMP_IV_XCHG_RATE_DATE	Date	Y	Currency Conversion Date
CMP_IV_ASSIGNMENT_ID	Number	Y	Assignment ID
CMP_IV_PERSON_ID	Number	Y	Worker ID

## Return Values

The following return variables are available to formulas of this type.

Return Value	Data Type	Required	Description
L_CURR_CODE	Char	N	Currency code from the formula

## Sample Formula

This sample formula determines the currency for a plan based on the component ID.

```

/*****
FORMULA NAME : Compensation Currency Selection Formula
FORMULA TYPE : Compensation Currency Selection
DESCRIPTION: It returns the currency code based on component_id.
*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_ASSIGNMENT_ID (number), CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number),
          CMP_IV_COMPONENT_ID (number)
/*===== INPUT VALUES DEFAULTS ENDS=====*/

/*===== FORMULA SECTION BEGIN =====*/
DEFAULT FOR CMP_IV_COMPONENT_ID IS 0
l_curr_code = 'XXX'
IF (CMP_IV_COMPONENT_ID = 489) THEN
(
l_curr_code = 'USD'
)
ELSE IF (CMP_IV_COMPONENT_ID = 490) THEN
(
l_curr_code = 'GBP'
)
RETURN l_curr_code
/*===== FORMULA SECTION END =====*/

```

## FAQs

### When must I make a component the primary component for budgeting?

When you link more than one component to a single budget pool, you must identify the primary component on the Configure Compensation Components page. When eligibility differs for components, each manager's total eligible salaries used for budgeting is the eligible salaries of workers who are eligible for the primary component.

### How can I configure a plan so that multiple components draw from the same budget pool?

On the Configure Compensation Components page, link all the components to the same budget pool and identify one of the components as the primary component. The primary component determines the population used when budgeting. For example, you have different eligible populations for each component where each component has a different total eligible salary.

# 17 Performance Ratings

## Performance Ratings: Points to Consider

If you consider performance ratings when allocating compensation, you can display ratings from Oracle Fusion Performance Management or rate workers during a workforce compensation cycle. Use the Configure Performance Ratings page to enable and configure performance ratings.

You can use performance ratings in the worksheet in the following ways:

- Display Performance Management ratings
- Rate workers within Workforce Compensation
- Use both Performance Management ratings and compensation ratings

## Display Performance Management Ratings

If you integrate with Performance Management, you can:

- Display overall and calculated performance ratings given in the Performance Management system
- Provide access to the full performance document from within the worksheet. Select:
  - The performance template (optional) or document name
  - The period to make available
  - Whether to display only completed ratings or ratings in any status
- Update the following in the compensation worksheet:
  - Overall performance rating
  - Overall goal rating
  - Overall competency rating
- Display the Performance Rating History column in the worksheet to see historical ratings given in the Performance Management system

Ratings updated in Performance Management automatically update in the worksheet and vice versa. You can give ratings for the first time in the worksheet as long as you create the performance document in Performance Management.

## Rate Workers Within Workforce Compensation

Managers can rate workers as they allocate compensation. You use these ratings only within the current compensation plan and cycle. The ratings don't transfer to the Performance Management system or to HR.

When you set up a plan, you can:

- Select a rating model to use
- Use the Manage Rating Model page to edit an existing rating model or create a new model

- Decide how managers rate performance, either by:
  - Selecting the rating from a list of values
  - Designating the number of stars to represent the worker's rating
- Display compensation ratings given in the previous plan cycle as a column in the worksheet

## Use Both Performance Management Ratings and Compensation Ratings

You can display both Performance Management ratings and compensation ratings in the worksheet. For example, your organization gave Performance Management ratings several months before the compensation cycle starts. You want managers to reassess their worker's performance to ensure that current performance is consistent with past performance.

You set up the plan to:

- Display the ratings given in the Performance Management system
- Enable managers to give compensation ratings during the compensation cycle as a point of comparison.
- View reports and analytics by both rating types
- Use both rating types as criteria for models

### *Related Topics*

- [Rating Models: Explained](#)



# 18 Workforce Compensation Approvals

## Configuring Approvals: Critical Choices

The hierarchy type defined for the plan determines the approvals hierarchy. You can create an alternate approval hierarchy for a manager that overrides the plan hierarchy.

You can also specify:

- Approvals in a different sequence
- Approvals by different people
- When managers can submit their worksheets for approval
- When they can approve their lower managers' worksheets

Decisions to make when configuring approvals are:

- Approval mode
- Submit mode
- Alternate approver hierarchy

### Approval Mode

Approval mode identifies when managers can approve their lower managers' worksheets. The following table shows the approval mode and timing.

Mode	Timing
<b>Approve anytime</b>	Managers can approve their lower managers' worksheets at any time during the period the worksheet is available to them.
<b>Manager must first submit</b>	Lower level managers must submit their worksheets upward for approval before a higher level manager can approve them.  Ensures that higher managers don't approve worksheets before lower managers have had time to complete them.
<b>Disable approvals</b>	Approvals are not required. <b>Approve</b> and <b>Return for Correction</b> actions are not available.

### Submit Mode

Submit mode identifies when managers can submit their worksheets. The following table shows the submit mode and timing.

Mode	Timing
<b>Submit anytime</b>	Managers can submit their worksheets at any time during the period the worksheet is available to them.

Mode	Timing
<b>All managers must be approved</b>	<p>Lower level managers must have their worksheets approved before a higher level manager can submit his own worksheet for approval.</p> <p>Ensures that higher managers review and approve allocations of lower managers before submitting allocations for their entire organization for approval.</p>
<b>Disable submit</b>	Managers can only save their worksheets. The <b>Submit</b> action is not available.

## Alternate Approver Hierarchy

By defining alternate approvers, you replace the standard approval hierarchy for a manager with a new set or sequence of approvers. Features of an alternate approver hierarchy are:

- The alternate approver doesn't have to be a part of the regular plan hierarchy.
- You can create a brand new approval hierarchy for any manager. Do this by identifying the specific individuals and using the approval sequence to determine the order in which approvals occur.
- The highest sequence is the final approver.

You commonly use alternate hierarchies when approval control transitions from managers to the HR department.

## Alternate Approver Hierarchy: Examples

The following scenarios illustrate how you can create different alternate approvers using the Configure Approvals page in the Manage Plans task.

The scenarios are:

- Alternate approver is the final approver
- Alternate approver precedes the final approver
- Alternate approver is in the middle of the standard hierarchy

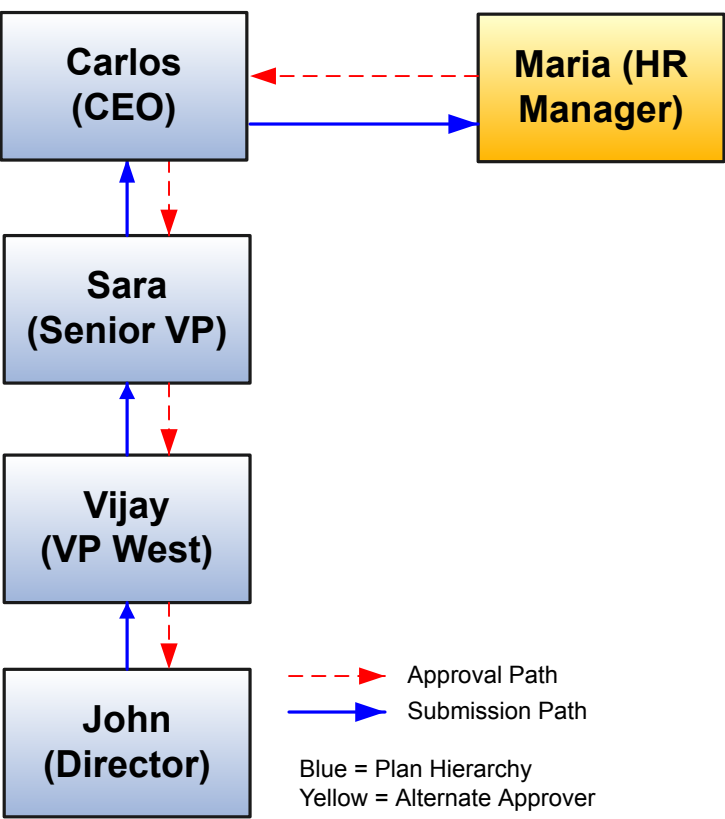
If you change an alternate approver hierarchy, you must refresh the manager hierarchy for those changes to take effect.

### Alternate Approver is the Final Approver

Carlos, the CEO, is the top manager in the hierarchy. After he approves all worksheets below him and submits his worksheet for approval, it goes to HR for final approval. The following table shows how you build the alternate approver table:

Primary Worksheet Manager	Approval Sequence	Alternate Approver
Carlos	1	Maria

This figure shows that Maria is the final approver of Carlos's worksheet. When Carlos submits his worksheet for approval, Maria is notified. Carlos's worksheet status is **In Approvals** until Maria approves it and it becomes fully approved.



## Alternate Approver Precedes the Final Approver

Carlos, the CEO, does not participate in the compensation approval process of his organization for managers under Sara. When Sara submits her worksheet, it goes to HR for final approval. The following table shows how you build the alternate approver table:

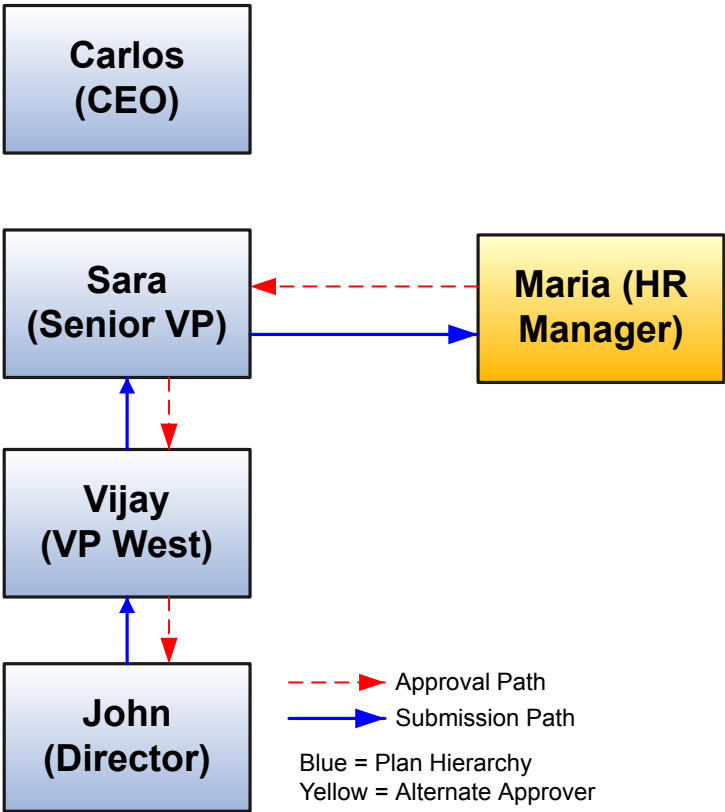
Primary Worksheet Manager	Approval Sequence	Alternate Approver
Sara	1	Maria

This figure shows that Maria is an intermediate approver of Sara's worksheet.

The approval flow is:

1. Maria is notified when Sara submits her worksheet for approval.
2. Maria approves Sara's worksheet. Sara and all lower managers' worksheets statuses are now **In Approval**.
3. Carlos sees that Maria approved Sara's worksheet.
4. If Sara is eligible for compensation, Carlos allocates an amount to her and saves his worksheet.

5. Carlos must approve all the worksheet for Sara and her lower managers for them to be fully approved.



## Alternate Approver is in the Middle of the Standard Hierarchy

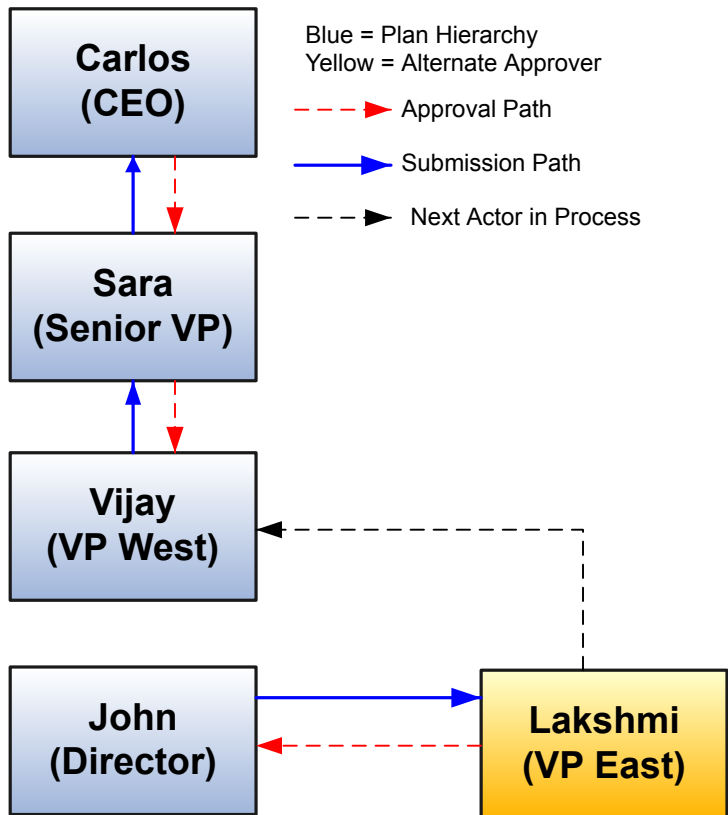
John reports to Vijay based on the plan hierarchy. However, John's entire team did a special project for Lakshmi during most of the past year. Sara wants Lakshmi to review and approve the compensation for John's team rather than Vijay. The following table shows how you build the alternate approver table:


Primary Worksheet Manager	Approval Sequence	Alternate Approver
John	1	Lakshmi

This figure shows that Lakshmi approves John's worksheet and the rest of the approvals occur within the standard hierarchy. The approval flow is:

1. Lakshmi is notified when John submits his worksheet for approval.
2. From the notification, Lakshmi approves or rejects the worksheet. She can open the workforce compensation work area from the notification, select John from the manager list at the top of the page, and review the details of John's worksheet. However, she can't approve or reject John's worksheet from the worksheet.
3. Vijay sees that Lakshmi approved John's worksheet by looking at the approval tab of his own worksheet. In the detail table, John's worksheet status is **In Approvals**.

4. Vijay is now able to submit his worksheet to progress the approval process. Vijay, Sara, and Carlos are still able to update compensation for workers on John's team even after Lakshmi approves John's worksheet.



 **Note:** If Lakshmi is not a line manager with security access to the workforce compensation work area, she requires the Compensation Approver job role to be able to review John's worksheet details.

## FAQs

### Can I configure workflow to route my worksheet for approval?

No. Workforce compensation uses the hierarchy created to build the worksheets to route approvals to the highest level manager. You can't create custom approval routes for worksheets. However, you can create alternate approval hierarchies for individual managers during setup using the Configure Alternative Approvers page.

## What's the difference between primary worksheet manager and alternate approver?

A primary worksheet manager is the worksheet owner responsible for allocating compensation to eligible workers, commonly the supervisor of the workers who appear on the worksheet.

An alternate approver is a person defined as an approver of a worksheet. The person may not be part of the standard hierarchy or may be in a different position than in the standard approval hierarchy. The hierarchy type defined for the plan builds the standard approval hierarchy. You configure the alternate approvers on the Configure Alternate Approvers page.

## Can I change an alternate hierarchy?

Yes. You can change the hierarchy of an already defined alternate approver on the Configure Alternate Approvers page without running the refresh process. You must refresh the data after the start compensation cycle process runs when you:

- Add an additional alternate approver for a new person
- Delete an alternate approver for an existing person

# 19 Worksheet Display

## Worksheet Tab Types: Explained

Tab types control the display of information on a worksheet page, which consists of one or more tabs. The information on each tab varies by the tab type. You can define up to 10 tabs for each worksheet when you configure the worksheet display. Commonly used default columns for each tab type make implementation easier.

Use the Configure Worksheet Display page to enable tabs and use the Configure Worksheet Page Layout page to configure them.

### Tab Types

When you set up the plan, you enable the tab types that correspond to what managers do during the compensation cycle. The following table shows the worksheet tab types and how they are used:

Tab Type	How They Are Used
Compensation	Manage and allocate compensation.
Approvals	View the status of lower manager's worksheets, approve or reject submitted worksheets, or request additional information.
Communicate	Generate compensation statements for workers to notify them of their new or adjusted compensation, performance rating, or promotion.
Performance	Give new performance ratings, or view existing performance ratings given either during a previous workforce compensation cycle or in Oracle Fusion Performance Management.
Promotions	View and update the job, grade, or position.
Detail table only	Display only the detail table without any summary information.

You can combine some tasks into a single tab:

- Give performance ratings and promotions on the compensation tab type
- Make compensation allocations on the performance and promotion tab types

You must enable and configure at least one tab type if you want managers to access their worksheets. Also, if your plan requires approvals you must enable and configure an Approvals tab type.

### Summary Sections

The compensation, performance, and promotions tab types have summary tables and graphs specific to the focus of the tab. The summary sections display:

- Compensation: Up to five components displaying six analytics

- Performance: Up to six columns and an optional graphic
- Promotion: Up to ten subordinate tabs

## Detail Tables

You can display the same set of columns in the details section of any tab type, except for the approvals and communicate tab types. The following table shows the detail table column groups and the type of information displayed.

Group Name	Information Displayed
Personal	Worker personal information such as name, e-mail, assignment manager and country.
Alerts	Alerts to notify managers of situations that need attention.
Employment	Assignment or employment term details, such as hire date, work location, working hours, manager name, job, grade, and person number.
Salary Information	Base pay information, such as the current salary, annualized full-time salary, current compa-ratio, current quartile.
Component 1 through 5	Information that's specific to a component, such as eligible salary, compensation amount, percentage of eligible salary, units, target amounts, and effective date. You can configure up to five components for a plan. The same set of columns is available for each component.
Promotion	Information related to job, grade, or position changes given during the compensation cycle, such as new job, new grade, new position, new salary range minimum, midpoint, and maximum, and promotion effective date.
Performance	Performance ratings given in Oracle Fusion Performance Management or during the current or previous compensation cycle. Information can include overall performance rating, calculated goal rating, worker potential, and risk of loss.
Custom Columns	Any type of information you can configure. Use custom columns 1-15 to display text. Use columns 16-45 to display numeric data. Use columns 46-50 to create custom lists from which managers can select a value.

## Compensation Tab Type: Explained

Managers use the compensation tab on the workforce compensation worksheet to manage and allocate compensation. It contains a summary table that displays high-level information about each component in the plan and a detail table. Select up to five components that you want to appear in the summary table. You can create different compensation tabs on which managers can focus on awarding different types of compensation.

Use the Configure Worksheet Display page to enable the tab and use the Configure Worksheet Page Layout page to configure it. The worksheet appears in the Workforce Compensation work area.

For each component in the plan, the summary section can display:

- Worker Population



- Allocation Statistics
- Salary Statistics
- Workers on Target
- Pay for Performance
- Alert Summary

You can expand the summary section for each component to view analytics that provide a snapshot of allocations in the current cycle.

## Summing Component Data

You can also sum the data for components selected to appear in the summary section.

1. Select the components you want to appear in the summary table.
2. Select to sum the data for all selected components within the plan in the summary table.

If the components use different units of measure the totals are inaccurate.

## Approvals Tab Type: Explained

The approvals tab on the workforce compensation worksheet is included in the worksheets only for managers with at least one lower-level manager. Higher-level managers use it to view the status of lower manager's worksheets, approve or reject submitted worksheets, or request additional information.

Use the Configure Worksheet Display page to enable the tab and use the Configure Worksheet Page Layout page to configure it. The worksheet appears in the Workforce Compensation work area. You can enable up to seven additional subtabs that display summarized information for each lower manager. When a column contains the number of workers or a percentage, you can drill down to see details about the workers.

The following table describes the subtabs and what they display.

Subtab	Information Displayed
Approvals	All lower-level managers and the status of their worksheets. This subtab is always enabled when the approvals type tab is enabled.
Compensation Overview	Number of workers awarded compensation during the cycle, the total amount allocated, and the total available budget.
Allocation Statistics	Five second-level subtabs displaying average allocation, allocation spread, as well as allocations by overall performance rating, compensation performance rating, and country.
Salary Analysis	Six second-level subtabs displaying averages by salary, compa-ratio, salary range position, quartile, quintile, and total salary.
Target Analysis	Three second-level subtabs displaying allocations compared to defined targets and target ranges.
Promotions	Number of workers whose job, grade, or position changed during the compensation cycle.

Subtab	Information Displayed
Performance	Seven second-level subtabs displaying allocations by overall ratings, goal ratings, competency ratings, as well as calculated ratings.
Alerts	Shows all the current alerts and enables managers to view the affected workers.

## Performance Tab Type: Explained

Managers can use the performance tab on the workforce compensation worksheet to give or view performance ratings. They give ratings either during a workforce compensation cycle or in Oracle Fusion Performance Management. Use the Configure Worksheet Display page to enable the tab and use the Configure Worksheet Page Layout page to configure it. The worksheet appears in the Workforce Compensation work area.

The performance summary section displays the number and percentage of workers for each rating. If you define a target distribution for the rating model you use, it displays that as well. The summary columns are:

- Actual Percentage
- Performance Rating
- Target Compensation Percentage
- Target Compensation Percentage Maximum
- Target Compensation Percentage Minimum
- Workers with Compensation

## Promotions Tab Type: Explained

Managers can use the performance tab on the workforce compensation worksheet to view and update the job, grade, or position. Use the Configure Worksheet Display page to enable the tab and use the Configure Worksheet Page Layout page to configure it. The worksheet appears in the Workforce Compensation work area.

The promotions summary section displays information within ten subtabs:

- By Team
- By Country
- By Business Unit
- By Department
- By Proposed Job
- By Years in Job
- By Performance Management Rating
- By Compensation Performance Rating
- By Custom Text Column 1

- Organizational Averages

## Detail Table Only Tab Type: Explained

The detail table tab on the workforce compensation worksheet displays only the detail table without any summary information. Use it when summarized information isn't appropriate.

Use the Configure Worksheet Display page to enable the tab and use the Configure Worksheet Page Layout page to configure it. The worksheet appears in the Workforce Compensation work area. For example, you set up a plan to capture information from managers or distribute data to managers where you don't allocate compensation, use performance ratings, and give promotions.

## Configuring Worksheet Tab Types: Examples

You can use different worksheet tab types to display a variety of information and for different business purposes. The following scenarios illustrate how you can use the tab types to design different compensation plans.

### Using Two Compensation Type Tabs to Allocate Merit and Stock Awards

Scenario: You want managers to allocate merit compensation and award stock in different tabs.

Follow these steps:

1. Create a plan that enables managers to award merit adjustments and stock during the same compensation cycle.
2. Enable two compensation type tabs, labeling the first Merit Adjustments and the other Stock Awards.
3. In the Merit Adjustments tab, enable:
  - a. Columns with information that managers require to make informed salary decisions. Examples: current base pay, eligible salary, current and new compa-ratio, quartile, salary range low, and salary range high.
  - b. The merit adjustment amount column so managers can enter adjustment amounts.
4. In the Stock Awards tab, enable the stock amount column.
5. In the summary table of each tab, set the corresponding component to only display.

The rolled-up merit information appears in the Merit Adjustments tab and the rolled-up stock details appear in the Stock Awards tab.

### Using One Compensation Type Tab to Allocate Merit and Bonus Awards, View Performance Ratings, and Promote

Scenario: You want managers to allocate compensation, award bonuses, view performance ratings, and promote workers in one tab.

Follow these steps:

1. Create a plan that enables managers to award merit adjustments and bonuses, as well as promote workers, during the same compensation cycle.
2. Enable one compensation type tab, labeling it Compensation Awards.
3. In this tab, enable:
  - a. Columns with information that managers require to make informed salary decisions. Examples: current base pay, eligible salary, current and new compa-ratio, quartile, salary range low, salary range high, and performance rating.
  - b. The merit adjustment amount and bonus amount columns so managers can enter amounts.
  - c. The job, new job, grade, and new grade columns so that managers can see their workers' current jobs and grades and promote workers to a new job or grade.

The summary table will include rolled up information about both the merit and bonus award.

## Using the Performance Type Tab, Promotion Type Tab, And Compensation Type Tab to Rate Performance, Promote, and Allocate Merit

Scenario: You want managers to rate performance, promote workers, and allocate compensation on individual tabs.

Follow these steps:

1. Create a plan that enables managers to rate worker performance, promote workers, and award merit increases during the same compensation cycle.
2. Enable and label three tabs as follows:
  - a. Performance type tab, labeling it Rate Performance.
  - b. Promotions type tab, labeling it Promote Workers.
  - c. Compensation type tab, labeling it Allocate Compensation.
3. In the Rate Performance tab, enable:
  - a. Columns related to a worker's performance. Examples: length of service, job, grade, last rating date, last rating.
  - b. The performance rating column.
4. In the Promote Workers tab, enable columns that help managers promote workers. Examples: time in grade, time in job, performance rating, potential, current job, current grade, current position, new job, new grade, and new position.
5. Configure summary subtabs related to team, proposed job, performance, and organizational averages.
6. In the Allocate Compensation tab enable:
  - a. Columns with information that managers require to make informed salary decisions. Examples: eligible salary current base salary, new base salary, current and new compa-ratio, quartile, salary range low, and salary range high.
  - b. The merit adjustment amount and merit adjustment percentage columns so that managers can enter amounts and percentages.

Performance ratings that you enter during a compensation cycle are used only within the compensation process and are not used outside the compensation tool.

## Plan Setup Dependencies: Critical Choices

Enable features and select worksheet actions when you set up a workforce compensation plan. Some of these decisions have dependent configuration requirements. Use the Manage Plans task in the Compensation work area.

### Task Dependencies

The following table lists the workforce compensation plan task that you enable and the corresponding dependency, along with the workforce compensation pages for the selections.

Task and Page	Dependent Selection and Page
Enable Oracle Performance Management (Configure Performance Ratings)	Enable at least one performance management rating column (Configure Worksheet Page Layout: Detail Table tab)
Enable Compensation Management Ratings (Configure Performance Ratings)	Enable at least one compensation performance column (Configure Worksheet Page Layout: Detail Table tab)
Enable compensation components (Configure Compensation Components)	Configure related components (Configure Worksheet Page Layout: Detail Table tab)
Enable a predefined or custom alert (Configure Alerts)	Enable Alert column (Configure Worksheet Page Layout: Detail Table tab)
Enable compensation change statements (Configure Compensation Change Statements)	Enable the Communications tab type (Configure Worksheet Page Layout)
Enable compensation type tab (Configure Worksheet Display)	Enable Components and create at least one component (Configure Compensation Components)
Enable a column that adjusts salary (Configure Worksheet Page Layout: Detail Table tab)	Enable at least one component to be posted as salary (Configure Worksheet Page Layout: Detail Table tab, Configure Column Properties dialog box, Element Mapping tab)
Enable budgeting and create a budget pool (Configure Budget Pools)	Enable components and create a component linked to the budget pool (Configure Compensation Components)

### Action Menu Dependencies

When you configure the worksheet page layout for a plan, you select the actions that managers can take on the worksheet. Some of the actions require selections on other workforce compensation pages as shown in the following table.

Action on the Configure Worksheet Page Layout: Actions Menu Tab	Dependent Selection and Page
Enable ranking actions	Enable rank column (Configure Worksheet Page Layout: Detail Table tab)

Action on the Configure Worksheet Page Layout: Actions Menu Tab	Dependent Selection and Page
Enable view compensation history action	Enable compensation history column (Configure Worksheet Page Layout: Detail Table tab)
Enable view notes action	Enable notes column (Configure Worksheet Page Layout: Detail Table tab)
Enable apply targets action	Enable the target column for at least one component (Configure Worksheet Page Layout: Detail Table tab)
Enable targets action	Enable and configure the target column for at least one component (Configure Worksheet Page Layout: Detail Table tab)
Enable hide ineligible workers action	Configure eligibility task (Configure Plan Eligibility)  Add a eligibility profiles to any component (Configure Worksheet Page Layout: Detail Table tab, Configure Column Properties dialog box)
Enable at least one modeling action	Enable modeling (Configure Modeling)
Enable view currency conversion rate table action	Enable currency switching (Configure Currency)

## Allocating Compensation by Percentage of Budget Amount: Points to Consider

You can allocate compensation as a percentage of the budget pool, rather than allocating compensation as a percentage of eligible salary or a flat amount. If you allocate compensation as a percentage of a budget pool, you must:

- Disable the eligible salary column for the component linked to the budget pool
- Disable modeling allocation methods that use eligible salary
- Understand how rounding rules can affect summary values

### Eligible Salary Columns and Allocation Method

The eligible salary columns and allocation method are enabled by default. If you enable the Percentage of Budget column for any component, you must disable the following:

- **Percentage of Eligible Salary** columns on the **Detail** tab for any given component
- **Total Eligible Salaries** and **Percentage of Total Eligible Salaries** columns on the **Summary** tab
- **n Percentage of Eligible Salary** allocation method, if you use modeling.

## Rounding Rules

The rounding rule set for the corresponding Component Amount column affects the amount calculated for the Percentage of Budget column.

Example: The following table shows the calculations when:

- Overall budget = 900 USD
- Rounding rule set for the Component Amount column = Round to the nearest 10
- Managers enter 4 in the Percentage of Budget column.

Column	Calculated Amount	Amount After Rounding
Component Amount	$(4 / 100) * 900 = 36$	40

When the percentage of budget calculation uses the rounded amount, the result is different than without the rounding, as shown in this table.

Column	With Rounding	Without Rounding
Percentage of Budget	$40 / 900 = 4.44$	$36 / 900 = 4$

## Static Worksheet Summary Columns: Explained

When managers filter their worksheets, the data in the summary section change to reflect the filtering criteria. You can enable three summary columns to remain static when managers apply the filters. Three related columns show the filtered data. You enable the columns on the on the Configure Worksheet Page Layout page, Summary Columns tab for a compensation type tab.

The following table shows the static and filtered columns.

Static	Filtered
<b>Overall Budget</b>	<b>Budget -Filtered by Team</b>
<b>Overall Available Budget</b>	<b>Available Budget -Filtered by Team</b>
<b>Overall Compensation Amount</b>	<b>Compensation Amount - Filtered by Team</b>

Example: You enable the **Overall Budget** summary column when you configure a worksheet. The **Budget -Filtered by Team** column is enabled by default. A manager changes the **Team** filter on his worksheet to one lower-level manager. In the **Summary** section, the **Overall Budget** column shows the budget amount for all his reports. The **Budget -Filtered by Team** column shows the budget amount for the filtered lower-level manager.

## Automatically Ranking Workers: Points to Consider

If you're ranking more than just your direct reports, you can automatically rank workers from highest rank to lowest rank using one of three methods:

- Rank workers based on their ranking score
- Rank workers based on their ranking percentile
- Copy direct managers' rankings

Regardless of the method you select to automatically rank workers, multiple workers could have the same rank in the results. You select whether to either:

- Retain the ties
- Arbitrarily resolve ties

How you handle ties can change the ranking results for any of the three automatic ranking methods.

### Rank Workers Based on Their Ranking Score

The ranking score considers the rankings of all managers who ranked the worker and who are in the viewing manager's organization. A worker's ranking score:

- Varies according to the manager viewing the score.
- Considers each manager's position in the hierarchy.

The rankings of higher level managers have more weight because the ranking compares the worker against a larger population of workers.

The following table compares the different ranking results for the same scores when you retain the ties or arbitrarily resolve the ties.

Worker	Score	Retain Ties	Arbitrarily Resolve Ties
Maria	100	1	1
Rahul	92	2	2
Maya	92	2	3
Janice	92	2	4
Carlos	32	3	5
Michael	32	3	6
Yan	18	4	7



## Rank Workers Based on Their Ranking Percentile

The ranking percentile considers the ranking given by a worker's direct manager when ranking at least ten workers. It places workers in order from highest to lowest within a range of 0 to 100.

Calculation:  $100 - (\text{rank} / \text{population} * 100) = \text{percentile}$ . The population is the total number of workers ranked by the direct manager. For example, if the direct manager ranks a worker five out of the 27 workers she ranked, the percentile is 82.

Calculation:  $100 - (5 / 27 * 100) = 82\%$ .

The following table compares workers based on their ranking percentile.

Worker	Percentile	Retain Ties	Arbitrarily Resolve Ties
Maria	95	1	1
Rahul	92	2	2
Maya	82	3	3
Janice	82	3	4
Carlos	64	4	5
Michael	50	5	6
Yan	47	6	7

## Copy Direct Managers' Rankings

The ranking score uses rankings given by each worker's primary worksheet manager exactly as given.

- Multiple workers can have the same ranking.
- Ranking values need not be consecutive.
- Managers can select to give the same ranking to multiple workers or can select to leave gaps in the ranking.

The following table compares the different tie handling results for a manager viewing the rankings that managers in his organization gave to their direct reports.

Direct Manager	Worker	Direct Manager's Ranking	Copy Direct Manager's Ranking	Retain Ties	Arbitrarily Resolve Ties
Lakshmi	Maria	1	1	1	1
Lakshmi	Rahul	2	2	2	3
Lakshmi	Maya	3	3	3	4

Direct Manager	Worker	Direct Manager's Ranking	Copy Direct Manager's Ranking	Retain Ties	Arbitrarily Resolve Ties
Lakshmi	Janice	4	4	4	6
Barry	Carlos	5	5	5	8
Barry	Michael	3	3	3	5
Barry	Yan	2	2	2	2
Barry	Prasad	4	4	4	7

## Ranking Score: How It's Calculated

The ranking score is a calculated value from 0 to 100 for each worker who has at least one ranking. It considers the rankings of all managers who ranked the worker, who is in the viewing manager's organization.

## Conditions That Affect the Ranking Score

The following conditions affect the ranking score:

- The ranking given by each manager. The rankings of higher-level managers have more weight because the ranking compares the worker against a larger population of workers.
- The viewer's position in the hierarchy
- The number of other workers ranked

## How the Ranking Score Is Calculated

This formula derives the ranking score:

$$100 \times [\text{SUM}(\text{Group Population} - \text{Ranking} + 1)] / \text{SUM}(\text{Group Population})$$

The following table describes the variables in the equation:

Equation Variable	Description
Group Population	Includes all ranked workers reporting directly or indirectly to the manager viewing the score.  The group population must include at least 10 workers for <name of application or process> to calculate a score.
Ranking	The position value given to a worker; it must be a positive, whole number from 1 to N.

Equation Variable	Description
1	Added to the numerator to ensure that workers ranked 1 by all managers receive a score of 100.
(Group Population - Ranking + 1)	Summed for the manager looking at the score and all lower managers who ranked the worker.

The scores are whole numbers only.

## Example 1

John views the rankings for a worker who reports directly to Peter. John ranked the worker 299 out of 2200 and Peter ranked the worker 1 out of his 7 workers ranked.

Manager	Worker's Ranking	Workers Ranked	Group Population - Ranking + 1
John	299	2200	1902
Susan	75	600	526
Henry	15	90	76
Nancy	4	26	23
Peter	1	7	7
Sum	not applicable	2923	2534

The ranking score of the worker John views is 86.

Calculation:  $(100 * 2534) / 2923$ .

## Example 2

Nancy views the same worker as John, in example 1.

Manager	Worker's Ranking	Workers Ranked	Group Population - Ranking + 1
Nancy	4	26	23
Peter	1	7	7
Sum	not applicable	33	30

The ranking score of the worker Nancy views changes to 91.

Calculation:  $(100 * 30) / 33$ .

## Example 3

Nancy views the same worker, with the same ranking as in the previous examples. However, she views a smaller number of workers ranked in her organization.

Manager	Worker's Ranking	Workers Ranked	Group Population - Ranking + 1
Nancy	4	10	7
Peter	1	7	7
Sum	not applicable	17	14

The ranking score of that worker Nancy views is now 82.

Calculation:  $(100 \times 14) / 17$ .

## Ranking Scores and Their Relation to Worker Population

The worker's ranking score is 82 in the smaller organization (example 3) and 91 in the larger organization (example 2). These examples illustrate that the same ranking results in a higher ranking score when the higher level manager has a larger population of workers ranked.

## Dynamic Calculations: Explained

Dynamic calculations are conditional statements or expressions. Use them to calculate and display values that vary by worker or to change the value of one column based on the value of another.

You build a condition by selecting worksheet columns, operators, and values, or by manually creating the condition using the Manage Dynamic Column page. When you use the Basic tab, the application guides you through the creation of conditions or column results. Alternatively, you can create expressions free-hand using the Advanced tab.

When a column's information source is outside of the compensation plan, the data might be out-of-sync until you run the refresh process or update the worksheet data. For example, dynamic columns that depend on the Performance Management Overall Rating might not show the actual performance rating until after you run the refresh process.

The aspects of dynamic calculations are:

- Evaluation order
- Triggering events
- Sequence number
- Default expression

## Evaluation Order

The evaluation order identifies the calculation order of multiple dynamic columns when the condition or results of one column uses the results of another. For example, you define a **Total Cash Compensation** column that displays the sum of an automatically calculated cost of living adjustment COLA and a manager-entered merit adjustment.

1. Define a dynamic column for the COLA adjustment for all workers that varies the adjustment by each worker's location and grade.
2. Give this dynamic expression an evaluation order of 1.
3. Give the **Total Cash Compensation** column an evaluation order of 2.

The application evaluates the COLA adjustment first and then uses that amount to display the **Total Cash Compensation** for each worker

## Triggering Events

Triggering events are actions that determine when to evaluate the dynamic calculations. The following table shows the events that trigger evaluation or recalculation of dynamic columns:

Triggering Event	Description and Usage
Start compensation cycle	Running the Start Compensation Cycle process evaluates the column conditions and calculates the results.  Example: You might select this trigger to calculate eligible salaries used during the cycle.
Refresh data	Running the Refresh Data process reevaluates all dynamic calculations, fast formulas, or HR data used in dynamic calculations.
Change worksheet data	Entering or changing data on the worksheet and tabbing out of the cell reevaluates the condition and corresponding results.  This trigger might slow the application performance. Use it only for column results that depend on data that change in the worksheet.

## Sequence Number

Sequence numbers identify the calculation order for conditions. Configure conditions that cover the most workers with the highest sequence numbers to reduce the impact to worksheet and batch process performance. Test a few dynamic calculations at a time to assess the impact on application performance and decide what level of performance impact you can accept.

## Default Expression

The default expression is the one to use when no other conditions are met. The application evaluates every condition in sequence order. The default expression must be the highest sequence number because it applies only after evaluation of all other conditions

If you don't select a default expression and no conditions are met, the column displays no values.

## Using Dynamic Calculations: Examples

Use these scenarios to understand how to use dynamic calculations to calculate and display a value or change the value of one column based on the value of another.

### Using Dynamic Calculations to Define Eligible Salary

You're setting up the annual compensation plan. You want to base the bonus eligible salary on the current annual salary. Using dynamic calculations, you create an expression that moves the current annual salary amount into the **Bonus Eligible Salary** column when you start the compensation cycle.

### Using Dynamic Calculations to Define Targets

As part of the annual bonus review you want to display bonus target amounts on the worksheet for managers to consider during allocations. Your company uses performance ratings and you want to use the ratings as the basis for the targets. Using dynamic calculations, you create expressions that vary the **Bonus Target Amount** by performance ratings. For example, if performance rating is **Outstanding**, then **Bonus Target Amount** equals 10 percent of **Bonus Eligible Salary**.

### Using One Column's Results in Another Expression

At your company managers can rate workers performance as part of the annual compensation cycle. As you set up the compensation plan you want to make sure that managers use performance ratings as a basis for determining salary increase targets. For example, the target for high performers is 10 percent of eligible salary and the target for average performers is 5 percent of eligible salary.

Using dynamic calculations, you:

1. Create an expression for the **Merit Eligible Salary**.
2. Give it an **Evaluation Order** of 1.
3. Create another expression that defines the **Target Compensation Percentage** as a percentage of **Merit Eligible Salary** for each different performance rating.
4. Give it an **Evaluation Order** of 2.

The application evaluates the **Merit Eligible Salary** first, and then uses it to calculate the **Target Compensation Percentage**.

#### *Related Topics*

- [Eligible Salary Column: Explained](#)

## Creating Dynamic Calculations: Worked Example

This example demonstrates how to create a dynamic column for an annual workforce compensation bonus plan that rewards high performing workers.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What events do you want to trigger the calculation?	<b>Start Compensation Cycle</b> and <b>Refresh Data</b>
What conditions do you want evaluated?	<b>Performance Rating</b> of 5 (Outstanding) and 4 (Exceeds Expectations)
Which column on the worksheet do you want to dynamically calculate?	<b>Compensation Amount</b> column for the Bonus component
What results do you want to see for the dynamic column?	A bonus of ten percent of annual salary for workers with a rating of 5. A bonus of five percent of annual salary for workers with a rating of 4. All others receive 0

## Task Summary

To create this dynamic calculation for the **Compensation Amount** column for the Bonus component, complete the following tasks. Use the default values except where otherwise indicated.

1. Create the dynamic calculation.
2. Build the first expression to identify and reward the highest performers.
3. Build the second expression to identify and reward the high performers.
4. Build the third expression to identify and not reward all other performers.
5. Test the dynamic calculation.

## Prerequisites

1. Create a workforce compensation plan.
2. Enable the **Compensation Amount** column for the Bonus component.
3. Enable performance ratings.
4. Set up a rating scale from 1 to 5, where 5 equals Outstanding and 4 equals Exceeds Expectations.

## Creating the Dynamic Calculation

1. On the Define Workforce Compensation page, Configure Worksheet Display row, click **Go to Task**.
2. On the compensate type tab row, click **Configure**.

3. In the Detail Table tab, click the **Dynamic Columns** button for the **Compensation Amount** column.
4. Select **Start compensation cycle** and **Refresh data** triggering events.
5. Click the **Add** button to create the first expression.
6. Enter 1 for the **Sequence**.
7. Click the **Create or Edit Expression** button for the **Condition**.

## Building the First Expression

This expression identifies workers with a performance rating of 5 and awards them a bonus that is 10 percent of their annual full-time salary.

1. Click **Build Condition**.
2. In the Basic tab, complete the fields as shown in this table.

Field	Value
<b>Column</b>	Performance Rating
<b>Operation</b>	Contains
<b>Fixed Value</b>	5

3. Click **Done**.
4. Click **Validate**. This step is optional.
5. Click **OK** in the confirmation.
6. Click **Apply**.
7. Click the **Create or Edit Expression** button for **Column Results** for the expression you just created.
8. In the Basic tab, select **Equation**.
9. Click **Switch to Column**.
10. Complete the fields as shown in this table. Click **Next** between steps.

Field	Value
<b>Column</b>	Annualized Full-Time Salary - Current
<b>Operation</b>	Multiplied by
<b>Fixed Value</b>	0.1

11. Click **Done**.
12. Click **Apply**.

## Building the Second Expression

This expression identifies workers with a performance rating of 4 and awards them a bonus that is 5 percent of their annual full-time salary.

1. Click **Add** button to create the second expression.



2. Enter 2 for the **Sequence**.
3. Click the **Create or Edit Expression** button for the **Condition**.
4. Click **Build Condition**.
5. In the Basic tab, complete the fields as shown in this table.

Field	Value
<b>Column</b>	Performance Rating
<b>Operation</b>	Contains
<b>Fixed Value</b>	4

6. Click **Done**.
7. Click **Apply**.
8. Click the **Create or Edit Expression** button for **Column Results** for the expression you just created.
9. In the Basic tab, select **Equation**.
10. Click **Switch to Column**.
11. Complete the fields as shown in this table. Click **Next** between steps.

Field	Value
<b>Column</b>	Annualized Full-Time Salary - Current
<b>Operation</b>	Multiplied by
<b>Fixed Value</b>	0.05

12. Click **Done**.
13. Click **Apply**.

## Building the Third Expression

This expression identifies workers with a performance rating that is less than 4 and doesn't award them any bonus.

1. Click the **Add** button to create the third expression.
2. Enter 3 for the **Sequence**.
3. Select **Default**.
4. Click the **Create or Edit Expression** button for **Column Result** for the expression you just created.
5. In the Basic tab, enter 0 as the **Fixed Value**.
6. Click **Done**.
7. Click **Apply**.

## Testing the Dynamic Calculation

1. Click the **Test Condition and Column Results** button.

2. Complete the fields as shown in this table.

Field	Value
Performance Rating	5
Annualized Full-Time Salary - Current	50000

3. Click **Test**.
4. Verify that the results are as expected and click **OK**.

## FAQs

### How can I store custom data to use as default worksheet column values?

Scenario: You have custom data such as scores, ratings, incentive plan, target percentages, and special earning calculator values stored in your HR application. You want to use this data to calculate bonuses, targets, group workers for compensation purposes, and so on.

Use tasks in the Define Elements, Balances, and Formulas task list in the Setup and Maintenance work area to:

1. Create a single payroll element with many input values and label these input values according to the data you want to load.
2. Load the worker-level data into element entries.
3. Write fast formulas to display each element input value as a default value in a worksheet column.

### What happens if I select Value Remains Unchanged when I configure a column's properties?

The percentages stored in the following columns remain static and don't change even when the corresponding amount related to eligible salary or budget pool changes.

- Compensation Percentage of Eligible Salary
- Compensation Percentage Maximum
- Compensation Percentage Minimum
- Target Percentage
- Target Percentage Maximum
- Target Percentage Minimum
- Worker Budget Percentage
- Percentage of Budget Pool

## Why are some columns already enabled in my new tab?

Each tab type includes commonly used columns enabled by default. You can deselect the columns if you don't want them to appear on the worksheet. Deselect the columns on the Configure Worksheet Page Layout page.

## What's the difference between Basic and Advanced tabs in the Edit or Create Condition Rules dialog box?

The Basic tab takes you through a sequence of steps to create a condition and places the columns and operators in the correct position of the expression.

On the Advanced tab, you can use the series of steps to create an expression. You can also:

- Manually edit a condition by placing the cursor where you want to insert a column or operator
- Create a condition by typing the names of columns and operators

Open the Edit or Create Condition Rules dialog box from the Manage Dynamic Column page.



# 20 Column Properties

## Configuring Column Properties: Explained

Use the Configure Column Properties dialog box to configure a column's properties. The number of tabs that appear on the dialog box and the fields that appear on the tabs vary depending on the column you're configuring.

### Pages

The following table shows on which page the Configure Column Properties dialog box is available and where the columns appear:

Page	Location
Configure Worksheet Page Layout	Summary table of the worksheet
	Detail table of the worksheet
Configure Budget Page Layout	Summary table of the budget sheet
	Detail table of the budget sheet
	Worker List page

### Tabs

The following table lists the tabs and what you configure on them:

Tab	Configures
General	Display and storage of data
Visibility and Access	Visibility of a column and who can view or update it
	Security of columns based on the presence or absence of a particular role or roles
Default Values	Settings that control default values displayed in the column
Element Mapping	How to transfer approved compensation awards to HR
Information	Additional information or details about the data displayed in any column

## Configuring the General Tab: Explained

The options available on the General tab control the display and storage of data. They vary depending on the type of column you're configuring and the selections you make on the tab. The tab appears on the Configure Column Properties dialog box.

The following table shows the fields that might appear on the tab:

Field	Description
Data Type	Number or character.
Rounding Rule	How you want numbers to round.
Decimal Place to Display	The number of places to show to the right of the decimal.
Show Numeric Separators	Display numeric separators, such as commas and periods.
Default Sequence	Sequence that the column appears in relation to the other columns.
Wrap text	Adjust row height rather than column width to show all of the field data.
Column Width	Column width in pixels from 50 to 200.
Column Shading	The color to apply as background for the column.
Monetary	Display monetary values. The application converts the values when managers change the worksheet display currency.
Include in Audit Trail	Include changes made to this column in the audit trail.
Value Remains Unchanged	The percentages stored in certain columns are to remain static and not change even when the corresponding amount changes.
Lookup Type	Display the related lookup type for the list value. Available for custom list columns only.
Display Total for All Components	Display a total for all components in the summary section of the worksheet. Available for numeric columns in the summary tab only.

### Related Topics

- What happens if I select Value Remains Unchanged when I configure a column's properties?

## Configuring the Visibility and Access Tab: Critical Choices

You use the **Visibility and Access** tab to configure if a column is visible and who can view or update it. You can also secure columns based on the presence or absence of a particular user role. For example, you want compensation managers to view and update a different set of worksheet columns than line managers. The tab appears on the Configure Column Properties dialog box

### Main Column Settings

The main column settings control column access when you don't select overrides. When you do select override roles, these settings control column access for all other roles. The following table shows the main column settings and what you configure:

Setting	Configures
<b>Enable</b>	Display the column on the worksheet.
<b>Read-only</b>	Make the column not editable on the worksheet.
<b>Initially hidden</b>	Hide the column in the worksheet until the manager selects to display it in the worksheet. Managers can add the hidden column to their worksheet by using the <b>View</b> menu.

### Role-Based Overrides

You override main column values on the worksheet based on role by selecting an override setting and adding one or more roles. Overrides apply only to roles added. The following table shows the override values and actions:

Value	Action
Not Enabled	Disable previously configured setting
Read Only	Role has read only access
Updatable	Role has update access
Blank	Don't override the main column values

Specify how the override settings apply to the roles you added by selecting one of these values:

- User has any of these roles
- User has none of these roles

## Configuring the Default Values Tab: Points to Consider

Use the **Default Values** tab to specify settings that control default values displayed in the column. The values populate the column on the worksheet when you run the Start Compensation Cycle process or the Refresh Data process. To include the column when you run the Refresh Data process, ensure that the column value is subject to refresh. Configuring default values is optional. The tab appears on the Configure Column Properties dialog box.

### Default Values

The following table shows the default values and what you configure:

Value	Configures
Default Value	Enter an initial, specific value for a column.
Default and Override Formula	Override any existing values and display values using the Compensation Default and Override formula type.  Test the formula for a sample person record to verify that the formula returns the expected results.
Compensation Derived Factor	Display values using a compensation derived factor.
Cross Reference Fields	For certain columns you have the option to cross reference data from other columns and plans.
External Data Record Type	User-defined lookup that stores record type from another application or third party.
External Data Column	Source column for values from the external data table.

#### Related Topics

- [Compensation Default and Override Formula Type](#)

## Configuring the Element Mapping Tab: Points to Consider

When you configure compensation component columns you identify how to transfer approved compensation awards to HR. You use the **Element Mapping** tab for the **Compensation Amount** column tab to identify awards as salary adjustments or as lump sum payments. The tab appears on the Configure Column Properties dialog box.

### Adjustment to Base Pay

If the compensation component is an adjustment to base pay you select **Yes** for Post as Salary. The application updates each worker's salary record with the amount stored in the column. If you want to post the current salary adjustment as



an itemized adjustment, you can optionally select a salary component, which creates a salary component record in each worker's main salary record.

- If you map to salary components, the Transfer Data to HR process posts approved salary adjustments to the individual components in the worker salary records.
- If you don't map to a salary component, the transfer process posts the sum of all components as a single salary adjustment to worker salary records.

## Example

You have a plan with two salary components for a worker's allocations:

- Merit Pay = 5,000 USD
- Cost of Living Allocation (COLA) = 1,500 USD

You want both of these components to increase the worker's base pay amount and you want to retain the breakdown of the amount for each component. When you configure the Compensation Amount columns for the Merit Pay and COLA components, you map:

- Merit Pay plan component to the Merit Salary component
- COLA plan component to the COLA salary component

The following table shows what the worker's salary record displays when the application transfers data to HR:

Adjustment	Amount in USD
Merit	5,000
COLA	1,500
Total	6,500

You can modify the list of salary components available using the CMP\_SALARY\_COMPONENT lookup type.

## Lump Sum Payment

If the compensation component is a lump sum payment, you select **No** for Post as Salary. You add the payroll elements to use to pay the compensation award. You can add multiple payroll elements to accommodate payments in different currencies and for workers in different legislative data groups.

### Related Topics

- [Actions and Reasons, Salary Components, and Plan Components: How They Work Together](#)

## Role Based Column Access: Examples

You can secure worksheet columns based on a particular role or roles. You select an override setting when you configure the worksheet column properties. Best practice is to configure the main column setting that applies to the most number of roles. Then, configure the override settings for the least number of affected roles. Follow these steps:

1. Enable columns using the Configure Worksheet Page Layout page.
2. Adjust access using the Configure Column Properties dialog box, Visibility and Access tab.

The following scenarios illustrate when you might want to vary column access.

### One Role Can See the Column, But the Other Role Cannot

You want compensation managers to see compa-ratio, but not line managers. Follow these steps:

1. Enable the Compa-Ratio column under the main column settings.
2. In the Visibility and Access tab, select the values as shown in the table:

Field	Value
Override Setting	<b>Not Enabled</b>
Condition	<b>User has any of these roles</b>

3. Add the line manager role.

### Both Roles Can See the Column, But Only One Role Can Update

You want both compensation managers and line managers to see the custom column, Individual Performance Multiplier, but only compensation managers to update it. Follow these steps:

1. Enable a custom numeric column and title it Individual Performance Multiplier.
2. In the Visibility and Access tab, select the values as shown in the table:

Field	Value
Main Column Settings	<b>Read-only</b>
Override Setting	<b>Updatable</b>
Condition	<b>User has any of these roles</b>

3. Add the compensation manager role.

## All Roles Can See and Update the Column, Except for Alternate Approvers

You want compensation managers and line managers to see and update the custom column Individual Performance Multiplier. But, you don't want alternate approvers who aren't line managers or compensation managers to view or update it. Follow these steps:

1. Enable a custom numeric column and title it Individual Performance Multiplier.
2. In the Visibility and Access tab, select the values as shown in the table:

Field	Value
Main Column Settings	<b>Enabled</b>
Override Setting	<b>Not enabled</b>
Condition	<b>User has none of these roles</b>

3. Add the line manager and compensation roles.

## Eligible Salary Column: Explained

You must configure the Eligible Salary column for each component in the plan when you use percentage columns or when your budget pool stores budgets as percentages.

Many calculations use eligible salary, such as

- Allocation percentage
- Target percentage
- Worker budget percentages

You might make eligible salary equal to each worker's current base pay, or you might prorate it based on various factors.

To define eligible salary:

- Select a fast formula or derived factor while you configure the column properties on the Configure Column Properties dialog box, Default Values tab
- Use dynamic calculations to determine each worker's eligible salary using the Manage Dynamic Columns page

Delivered samples of eligible salary proration formula are available to copy and modify from the Manage Fast Formula page. Use the Compensation Default and Override formula type.

### Related Topics

- [Using Dynamic Calculations: Examples](#)
- [Compensation Default and Override Formula Type](#)

## Varying Worksheet Column Results: Points to Consider

You can use fast formulas and dynamic columns to vary column results on the worksheet. The best method depends on the data you use, the complexity of the calculation, and the timing of the refresh data process.

### Varying Worksheet Column Results

The following table compares the two methods.

Comparison	Using Fast Formulas	Using Dynamic Columns
Data Used	Any data in Oracle Fusion applications that has a database item (DBI)	Other worksheet columns
Calculation	Simple to complex formulas that require multiple compound conditions or multiple database records	Simple "if then" expressions or a few compound conditions
Refresh Timing	<p>You run the:</p> <ul style="list-style-type: none"> <li>Start Compensation Cycle process for the first time</li> <li>Refresh Data process with the <b>Refresh column defaults</b> or <b>Full refresh</b> option selected</li> </ul>	<p>You run the:</p> <p>Start Compensation Cycle process for the first time</p> <p>Refresh Data process with one of these options selected:</p> <ul style="list-style-type: none"> <li><b>Refresh column defaults</b></li> <li><b>Full refresh</b></li> <li><b>Refresh dynamic columns</b></li> </ul> <p>A manager tabs out of a column, if you select the <b>Change worksheet data</b> option</p>
Where Created	Manage Fast Formulas task	Manage Dynamic Columns page

#### Related Topics

- Dynamic Calculations: Explained
- Compensation Default and Override Formula Type
- Using Formulas: Explained

## Numeric Properties in Models: Explained

When you configure numeric columns you determine the following numeric properties: whether to use numeric separators, how to round numbers, and how many decimal places display.

### Numeric Properties

When you use the numeric columns in models, the numeric properties vary depending on from where you open the model and where you configured the column. The following table shows the source of the column configuration by where you open the model.

Model Region	Where Model Opened	Numeric Properties Source
Model Summary	Budget Sheet	Configure Budget Page Layout Summary Tab, Define Column Properties dialog box
Model Summary	Worksheet	Configure Worksheet Page Layout Summary Tab, Define Column Properties dialog box
Model Detail Table	Anywhere	Configure Worksheet Page Layout Detail Tab, Define Column Properties dialog box

## Using External Data: Worked Example

This example demonstrates how to add a single row of external data and then use the data in workforce compensation and total compensation statements.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Do you want to use one of the delivered lookup codes or add a unique code?	Add a unique code
Do you want to import or manually add the external data?	Manually add
Do you want to use the data for workforce compensation or total compensation statements?	Both
What do your external data custom columns represent?	<ul style="list-style-type: none"><li>Column 01 is Beginning Balance</li><li>Column 02 is Ending Balance</li></ul>

## Task Summary

To import external compensation data, complete the following tasks. Use the default values except where otherwise indicated.

1. Add a lookup code.
2. Add external data.
3. Configure the worksheet columns.
4. Configure the compensation items.

## Prerequisites

1. Install the Oracle ADF Desktop Integration Add-in for Excel.
2. Configure a workforce compensation plan.
3. Create a total compensation statement.

## Adding a Lookup Code

1. In the Compensation work area Tasks panel tab under Common Configuration, click **Manage Lookups** to open the Manage Lookups page.
2. Search for the CMP\_EXTERNAL\_DATA\_RECORD\_TYPE lookup type.
3. In the CMP\_EXTERNAL\_DATA\_RECORD\_TYPE: Lookup Codes section, click **Add**.
4. Complete the fields as shown in this table.

Field	Value
<b>Lookup Code</b>	FID_401K
<b>Display Sequence</b>	1
<b>Start Date</b>	1/1/01
<b>End Date</b>	12/31/20
<b>Meaning</b>	Fidelity 401K
<b>Description</b>	Data from Fidelity 401K provider

5. Click **Save**.

## Adding External Data

1. In the Compensation work area Tasks panel tab under Common Configuration, click **Manage External Data** to open the Manage External Data page.
2. In the Search Results section, click **Add**.
3. In the **Person Name** field, select the person for whom you're adding the external data.
4. Complete the fields as shown in this table.

Field	Value
<b>Record Type</b>	Fidelity 401K
<b>Start Date</b>	1/1/14
<b>End Date</b>	12/31/14
<b>Sequence Number</b>	1
<b>Currency</b>	US Dollar
<b>Column 01</b>	100,000
<b>Column 02</b>	132,000

## Configuring the Worksheet Columns

1. In the Compensation work area Tasks panel tab under Workforce Compensation, click **Manage Plans** to open the Manage Workforce Compensation Plans page.
2. Click the configured workforce compensation plan to open the Define Workforce Compensation page.
3. For Configure Worksheet Display, click **Go to Task** to open the Configure Worksheet Display page.
4. For a compensation type tab, click **Configure** to open the Configure Worksheet Page Layout page.
5. Select the **Detail Table** tab.
6. Expand **Custom Columns**.
7. Enable **Custom Numeric Column 16**. Because the external data in this example is numeric, you select a numeric type column.
8. In the **Display Name** field, enter Beginning Balance.
9. Click the **Configure Column Properties** button to open the Configure Column Properties dialog box.
10. Select the **Default Values** tab.
11. Complete the fields as shown in this table.

Field	Value
<b>External Data Record Type</b>	Fidelity 401K

Field	Value
<b>External Data Column</b>	Column 01

12. Click **OK** to return to the Configure Worksheet Page Layout page.
13. Enable **Custom Numeric Column 17**.
14. In the **Display Name field**, enter Ending Balance.
15. Click the **Configure Column Properties** button to open the Configure Column Properties dialog box.
16. Select the **Default Values** tab.
17. Complete the fields as shown in this table.

Field	Value
<b>External Data Record Type</b>	Fidelity 401K
<b>External Data Column</b>	Column 02

18. Click **OK** to return to the Configure Worksheet Page Layout page.
19. Click **Save and Close** to return to the Configure Worksheet Display page.
20. Click **Save and Close** to return to the Define Workforce Compensation page.
21. Click **Done** to return to the Manage Workforce Compensation Plans page.

## Configuring the Compensation Items

Add the two compensation items. Repeat steps 2 and 3 to create the second compensation item.

1. In the Compensation work area Tasks panel tab under Total Compensation Statements, click **Manage Compensation Item** to open the Manage Compensation Items page.
2. In the Search Results section, click **Create** to open the Create Compensation Item dialog box.
3. Complete the fields as shown in this table.

Field	Item One Value	Item Two Value
<b>Item Name</b>	Beginning Balance	Ending Balance
Source Type	External Data	External Data
<b>Record Type</b>	Fidelity 401K	Fidelity 401K
<b>Column</b>	Column 01	Column 02
<b>Type of Compensation</b>	Monetary	Monetary
<b>Currency</b>	US Dollar	US Dollar



4. Click **Save and Close** to return to the Manage Compensation Items page. The first time, repeat steps 2 and 3 to create the second compensation item. The second time, click **Save and Close**.

#### Related Topics

- [Importing Market Data in the Integrated Workbook: Procedure](#)
- [How can I add external compensation data to use in workforce compensation and total compensation statements?](#)
- [How do I add external compensation data for multiple assignments?](#)
- [External Data Lookups: Explained](#)

## Cross Referencing Data Between Plans: Points to Consider

To see data combined from multiple plans in one plan, create a single reporting plan and cross reference data for certain columns from other compensation plans. The referenced data is available in the new plan immediately after you save the worksheet in the originating plan. When you set up a new plan, you configure the column properties for the worksheet columns. If the type of column is available to cross reference, then you can specify the following default values:

- Cross-reference plan
- Cycle matching
- Column to cross reference

### Cross-Reference Plan

You can cross reference all active plans, even plans with no started cycles. You can also reference a plan within itself to display values from a previous plan cycle in a subsequent cycle. For example, you can display a target amount from a previous plan cycle in the current plan cycle. Managers are aware of that data when making a current compensation decision.

Cross-referencing a column from another plan is not available if you have selected values for these fields on the Configure Column Properties dialog box::

- Default Value
- Default and Override Formula
- Compensation Derived Factor

### Cycle Matching

You select which cycle to use to obtain the reference data by specifying the cycle to match. You must start the cycle first. The following table describes the cycle matching values:

Value	Description
Same Cycle Extract Date	Match the HR Data Extraction Date of the current plan's cycle to find the cross-reference plan's cycle.
Same Cycle Display Name	Match exactly the same display name of the current plan's cycle to find the cross-reference plan's cycle.

Value	Description
Previous Cycle Extract Date	Compare the current plan's HR Data Extraction Date to the most recent extract date from the cross reference plan. The extract date from the cross reference plan must be earlier than the current plan's date. You can use this value to reference data from cycle to cycle within the same plan, such as to bring in values from last year's bonus cycle.
Latest Cycle Extract Date	Obtain the latest extract date from the cross reference plan without regard to the current plan's extract date. You can use this value in a total compensation plan that is always available and automatically clears after the new cycles run.

## Columns to Cross Reference

You can cross reference most columns in the cross reference plan. You can't cross reference the following types of columns

- Promotion columns
- Performance Management columns
- Iconic columns
- HR data columns
- Percentage columns
- Columns that are cross referenced from another plan

## Cross Referencing Data Between Plans: Examples

The following examples illustrate when to cross reference data between compensation plans.

### Example 1

You create a salary plan and a bonus plan. You want managers to have a total compensation view when awarding from either plan, even if they are not open concurrently. Follow these steps:

1. In the bonus plan, reference the **New Salary** or **Salary Change Amount** column.
2. In the salary plan, reference the **Bonus Amount** column.

### Example 2

Your company wants to create a single compensation change statement that includes compensation awarded from multiple plans. Follow these steps:

1. Create a compensation statement plan.
2. Reference all the compensation awarded from each of the different plans into the compensation statement plan.
3. Generate worker statements from the single plan.

Each worker receives only one compensation statement.

## Default and Override Formula Type

The Compensation Default and Override formula determines the default values populated in a column for a workforce compensation plan. When you configure the worksheet display for a column in the Configure Column Properties dialog box, Default Values tab, you can select this formula.

The following predefined formulas are available for the eligible salary column for this formula type.

**▲ Caution:** Use these formulas as samples for testing purposes only. Copy and create your own version of a formula for use in your own compensation plans. Modifying the sample formula might provide unexpected results upon upgrade.

Formula	Description
CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE	Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period.
CMP_ELIGIBLE_SALARY_PRORATION_MONTH_END_AVERAGE	Eligible salary calculated by averaging salary on the last day of each month in the workforce compensation cycle evaluation period. Uses salary on the last day of the evaluation period for midmonth evaluation end dates.
CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_NINETY_DAY_MIN	Eligible salary calculated by averaging daily salary. Accounts for number of days that a salary is in effect during the workforce compensation cycle evaluation period. Returns zero for workers who worked fewer than 90 days.
CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_USING_FTE	Eligible salary calculated by averaging daily salary adjusted for part-time workers. Accounts for number days that a salary is in effect and FTE during the workforce compensation cycle evaluation period.
CMP_ELIGIBLE_SALARY_PRORATION_DAILY_AVERAGE_FOR_JOBS	Eligible salary calculated by averaging salary for the number of days a worker holds a specific job code on the assignment. Accounts for the number of days that a salary is in effect during the workforce compensation cycle evaluation period.

## Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED
- EFFECTIVE\_DATE
- END\_DATE
- START\_DATE
- HR\_ASSIGNMENT\_ID
- HR\_TERM\_ID
- JOB\_ID
- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE

- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID
- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

## Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

## Input Variables

The following input variables are available to formulas of this type.

Input	Data Type	Required	Description
CMP_IV_PLAN_ID	Number	Y	Unique numeric identifier for the workforce compensation plan
CMP_IV_PERIOD_ID	Number	Y	Unique numeric identifier for the fiscal calendar period
CMP_IV_COMPONENT_ID	Number	Y	Unique numeric identifier for the workforce compensation plan component
CMP_IV_ITEM_NAME	Char	Y	Name for the workforce compensation plan item
CMP_IV_PERSON_ID	Number	Y	Unique numeric identifier for the worker associated with the workforce compensation plan
CMP_IV_PLAN_START_DATE	Date	Y	Date on which the workforce compensation plan becomes active
CMP_IV_PLAN_END_DATE	Date	Y	Date on which the workforce compensation plan becomes inactive
CMP_IV_PLAN_ELIG_DATE	Date	Y	Date on which the workforce compensation plan becomes eligible
CMP_IV_PERFORMANCE_EFFECT_DATE	Date	Y	Date to use for compensation performance ratings
CMP_IV_PROMOTION_EFFECT_DATE	Date	Y	Date on which job, grade, and position changes take effect

Input	Data Type	Required	Description
CMP_IV_XCHG_RATE_DATE	Date	Y	Date on which the application obtains conversion rates from the GL daily rates table
CMP_IV_ASSIGNMENT_ID	Number	Y	Date to use for assignments

## Return Values

The following return variables are available to formulas of this type.

Return Value	Data Type	Required	Description
L_DEFAULT_VALUE	Number/ Char/Date	Y	Default value from the formula. The date should be in yyyy/mm/dd format
L_DATA_TYPE	Char	Y	Data type of the column

## Sample Formula

This sample formula determines the value of a column based on its item name.

```

/*****
FORMULA NAME : Compensation Default and Override Formula
FORMULA TYPE : Compensation Default and Override
DESCRIPTION : Defaults the value of a column based on its item_name
*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_PLAN_ID (number), CMP_IV_PERIOD_ID (number), CMP_IV_COMPONENT_ID (number),
CMP_IV_ITEM_NAME (text)
/*===== INPUT VALUES DEFAULTS ENDS=====*/

/*===== FORMULA SECTION BEGIN =====*/

DEFAULT FOR CMP_IV_ITEM_NAME IS 'YYYYYYY'
L_DEFAULT_VALUE = to_char(0)
IF (CMP_IV_ITEM_NAME = 'AmountComp1') THEN
(
L_DEFAULT_VALUE = to_char(3333)
)
ELSE IF (CMP_IV_ITEM_NAME = 'AmountComp2') THEN
(
L_DEFAULT_VALUE = to_char(7777)
)
ELSE
(
L_DEFAULT_VALUE = to_char(-999)
)
RETURN L_DEFAULT_VALUE

/*===== FORMULA SECTION END =====*/

```

## Default and Override Formula Test Results: Explained

You can test the Default and Override formula that you use to determine a column's default value when you configure the column properties. For example, when you configure the **Eligible Salary** column, you select an eligible salary proration formula to calculate the eligible salary for your workers. To test the results, you select a sample worker and assignment. The Test Results dialog box returns a value of 40,000, which is the expected eligible salary for the worker that you tested.

The following table describes some of the results you might receive and the corrective actions:

Results	Corrective Action
Value you expect	None
Incorrect formula	Go to the Manage Fast Formula page to correct your formula.
No salary	Check the person's salary record and ensure that the record exists as of the HR Data Extract Date
Person is ineligible	Check the eligibility profile associated with the assignment.

### Related Topics

- [Compensation Default and Override Formula Type](#)

# 21 Default Worksheet Display

## FAQs

What happens to the plan level default worksheet display configurations if managers set their own default display?

The default display settings that managers set on the worksheet take precedence over the plan-level settings on the Configure Default Worksheet Display page.





# 22 Alerts

## Predefined Alerts: Explained

You can use predefined alerts to notify managers about issues on the worksheet that need their attention. Use the Configure Alerts page to enable predefined alerts.

### Predefined Alerts

The following table shows conditions on the worksheet or changes in HR trigger predefined alerts.

Predefined Alert	Trigger
Salary changed in HR	Salary amount changed in HR
Allocation outside target range	Compensation amount is less than the target minimum or greater than the target maximum configured on the Configure Worksheet Page Layout page
Grade changed in HR	Grade changed in HR
Primary worksheet manager does not match line manager	Primary worksheet manager doesn't match line manager on the worker's employment record
New salary outside salary range	New salary amount is less than the salary range minimum or greater than the salary range maximum for their current grade
Worker was terminated	Worker was terminated in HR

## Creating Custom Alerts: Worked Example

This example demonstrates how to create a custom alert that displays a warning on the worksheet when a manager allocates a bonus amount that is more than the recommended bonus amount. The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What worksheet actions do you want to trigger the alert?	Manager allocates a bonus amount that is more than the recommended bonus amount.
What type of alert do you want to display?	Warning

## Task Summary

To create the custom alert, complete the following tasks. Use the default values except where otherwise indicated.

1. Create a custom alert.
2. Test the custom alert.

## Prerequisite

1. Create a workforce compensation plan.

## Creating the Custom Alert

1. On the Define Workforce Compensation page, Configure Alerts row, click **Go to Task**.
2. In the Custom Alerts section, click the **Add** button.
3. In the new row complete the fields as shown in this table.

Field	Value
<b>Name</b>	Bonus exceeds maximum recommended amount
<b>Type</b>	Warning
<b>Description</b>	You allocated more than the recommended bonus amount

4. Click the **Define Condition that Displays Alert on Worksheet** button.
5. On the Edit Condition dialog box, Basic tab, click **Build Condition**.
6. Complete the fields as shown in this table.

Field	Value
<b>Column</b>	Bonus Amount
<b>Operation</b>	Is greater than

7. Click **Switch to Column**.
8. Select **Bonus Target Amount**.
9. Click **Done**.
10. Click **Validate**. This step is optional.
11. Click **OK**.
12. Click **Apply**.

## Testing the Custom Alert

1. Click the **Test Custom Alert Condition** button.
2. On the Test Condition dialog box complete the fields as shown in this table.

Field	Value
<b>Bonus Amount</b>	5000
<b>Bonus Target Amount</b>	2000

3. Click **Test**.
4. Verify that the results are as expected in the Review Results dialog box and click **Done**.

## Custom Alerts: Examples

You can create custom alerts that appear in the worksheet that notify managers to conditions that exist. Use the Configure Alerts page to define:

- The type of alert
- The criteria that triggers the alert
- A description that appears with the alert

The following scenarios illustrate when you might want to create custom alerts.

## Warning Managers That Their Compensation Amounts Changed After They Allocated Compensation

You want to warn managers when someone changes a compensation amount that they entered for a worker. You create a condition that triggers an alert anytime someone overrides an amount entered by the person who supplied the original amount. The following table shows how you create the alert.

Field	Data
Type	Warning
Criteria	<b>Original Amount Updated By - Component 1</b> column is not equal to <b>Compensation Amount Last Updated By - Component 1</b> column
Description	The amount you entered was overridden.

## Preventing Managers From Allocating More Than Targeted

Your company policy prohibits managers from allocating more compensation than is targeted for a worker. You create a condition that triggers an alert when a manager allocates more than the worker's targeted amount and tells the manager how to resolve the problem. Error preventing submit alerts prevent managers from saving or submitting their worksheets until they resolve the issue. The following table shows how you create the alert.

Field	Data
Type	Error preventing submit
Criteria	<b>Compensation Amount</b> column is greater than <b>Compensation Target</b> column
Description	Compensation amounts can't exceed defined targets. Adjust the amount you allocated to the worker.

## Notifying Managers When New Base Salary Is Greater Than Salary Range Maximum

You want to notify managers when a worker's new base salary exceeds the worker's salary range maximum. The following table shows how you create the alert.

Field	Data
Type	Information
Criteria	<p><b>New Base Salary</b> column is greater than:</p> <p><b>Salary Range Maximum - Current</b> column</p> <p>Or</p> <p><b>Salary Range Maximum - New</b> column</p>
Description	Worker's new salary exceeds the worker's salary range maximum.

# 23 Reports and Dimensions

## OTBI Reports: Explained

You can use Oracle Transactional Business Intelligence (OTBI) to create custom, real-time reports using Workforce Compensation, salary and stock data. In the Workforce Compensation work area, you can make these reports available to line managers to reference during a compensation cycle.

For more information on creating OTBI reports, see the Oracle Business Intelligence Enterprise Edition User's Guide.

## Adding the Reports to a Compensation Plan

All OTBI and Oracle Business Intelligence Enterprise Edition (OBIEE) reports that you save in the shared/custom/HCM/Compensation folder are available to add to a Workforce Compensation plan. As you configure the reports for the plan, you can add reports from this folder and provide a new display name, if you want. You can add up to 25 reports for each plan. Removing a report from a plan doesn't delete the source report from its original location.

## Implementor Access

The Compensation Manager and Compensation Analyst roles contain the privileges to view and create OTBI reports. Implementors must have the Compensation Manager role to view the available reports, in addition to the Compensation Administrator role required to set up a compensation plan.

## Line Manager Access

Line managers must have the Compensation Transaction Analysis Duty role to view OTBI reports. The delivered line manager role doesn't inherit this duty role. You must create a custom line manager role that includes the Compensation Transaction Analysis Duty. Then, line managers can access an OTBI report from the **Reports** task pane in the workforce compensation work area. All managers at all levels of the hierarchy can view the reports.

## Dimensions: Explained

Dimensions are attributes that you use to group data in reports or as criteria when building models. You can enable the dimensions that have meaning to your organization within the context of the plan. Some examples of delivered dimensions are:

- Country
- Department
- Years of service
- Performance management rating
- Location
- Job
- Position

- Grade

Aspects of dimensions include:

- Reporting usage
- Modeling usage
- Range increments

## Reporting Usage

Reports use dimensions to group data. For example, you can analyze:

- Compensation allocations by country and job to see how average allocations vary
- Salaries by performance rating and compa-ratio to verify data or correct pay discrepancies, for a given manager's team

## Modeling Usage

Models use dimensions as criteria to build models. For example, when you create a model to automatically allocate salary adjustment amounts, you know that a worker's country and location affect the allocation. You can select **Country** and **Location** as modeling criteria to model values for workers who meet each combination of criteria.

## Range Increments

When aggregating data across people, you can define increments to display for the following ranges:

- Compa-Ratio
- Salary Range Position
- Years Employed
- Performance Management Calculated Overall Rating
- Performance Management Calculated Goal Rating
- Performance Management Calculated Competency Rating

Graphs and tables don't show a separate data point for each person. Instead, they show people grouped within the increments defined. For example, when using compa-ratio to group data in reports, you want to see workers grouped in increments of 10 percentage points. The model groups together all workers whose compa-ratio falls between 80 and 90.

# 24 Validation and Processing

## Terminated Worker Processing: Explained

Workers with a termination date between the cycle evaluation start date and HR data extraction date are included in the cycle as long as they meet all eligibility criteria. The Start Compensation Cycle process uses the worker's termination date to extract HR data rather than the HR Data Extraction date.

When the cycle is over, the Transfer Data to HR process creates element entries and salary records to process lump sum awards and salary adjustments. The effective date of the award must be earlier than or equal to the worker's termination date. The Transfer Data to HR process fails if a salary adjustment or lump sum effective date is later than the worker's payroll last standard process date.





# 25 Global Settings

## Notification Text: Explained

You can enable workflow notifications to be sent when managers perform certain actions using the Configure Global Settings task. The Request Information notification is always enabled. The field doesn't appear on the Configure Global Settings page.

### Notification Text

The notification name identifies the manager action that sends the notification. Each notification consists of header and message text, which is not configurable.

Notification	Header Text	Message Text
Budget Published	Compensation Budget Published for {manager who received the budget} ({budget amount} {currency code})	{manager who published the budget} published a budget to you for the plan {plan name}. You can publish budgets to lower managers or begin allocating compensation.
Worksheet Submitted	Approval of {plan name} for {submitting manager}	{submitting manager} submitted {plan name} worksheet for approval. Review it and take the appropriate approval action.
Worksheet Returned for Correction	Your {plan name} Worksheet is Returned for Correction	{submitting manager} returned your worksheet for correction. Review it, make the necessary changes, and resubmit for approval
Worksheet Approved by Higher Manager	Your {plan name} Worksheet is Approved	Your worksheet was approved by {approving manager}. It is still in the approval process until final approval is obtained.
Final Approval Obtained	{plan name} Worksheet is Fully Approved	Your worksheet has obtained final approval.
Plan Access Changed	{plan name} Worksheet Access Was Changed	Your access to the plan and cycle was changed.
Worksheet Withdrawn	{plan name} Worksheet was Withdrawn by {manager name}	{withdrawing manager} withdrew the {plan name} worksheet. {withdrawing manager} will resubmit the worksheet when it is ready for your approval.
Budget Withdrawn	Compensation Budget Withdrawn by {manager name}	{manager name} withdrew your budget for {plan name}. Your worksheet will display a zero available budget.
Due Date Changed	{plan name} Worksheet Due Date Changed	Your due date changed. Submit your worksheet on or before the new due date shown.

Notification	Header Text	Message Text
Worksheet Overridden by Higher Manager	Your {plan name} Worksheet was Modified by {manager name}	Compensation allocations for one or more of your workers was overridden by {manager name}. View details of the override from the plan worksheet.
Request for Information	Information Request from {manager name} Regarding {plan name}	{manager name} requested additional information about your worksheet. Review the comments and provide a response.
Eligibility Change	Eligibility Change Requested by {manager name} ({worker name})	{manager name} requested to change worker eligibility for the plan or component. Review the request and take the appropriate action
Worker Reassignments	Worker Reassignment Requested by {manager name} ({plan name})	{manager name} requested to reassign the following workers to your worksheet. The reassignment is only effective for the plan and cycle shown and does not affect the manager relationship in worker employment records. Review the request and take the appropriate action
Delegate Worker Used to notify managers only	Workers Added to Your Compensation Worksheet	No predefined text.
Remove Worker Delegation Used to notify managers only	Workers Removed from Your Compensation Worksheet	No predefined text.
Delegate Worker Used when approval is required	Worker Delegation Requested by {0} ({1})	The following workers will be added to your compensation worksheet.
Remove Worker Delegation Used when approval is required	Worker Delegation Removal Requested by {0} ({1})	The following workers will be removed from your compensation worksheet.

## Notifications: How They Work

You can send notifications when managers perform certain actions on the worksheet or budget sheet. The type of notification sent depends on the selections made on the Configure Global Settings page.

## Settings That Affect the Workforce Compensation Notifications

The following table shows the individual action that you can set the notification to and examples of each action.

Notification Setting	Example
Notify	Always send notifications for all worksheet actions
Prompt manager	Send notifications for actions only if the initiating manager selects
Approval required	Require approval for eligibility changes
Disable	Disable notifications so that none are sent when the plan access changes

Disable is the only action available for all settings. The Request Information notification is always enabled. The field doesn't appear on the Configure Global Settings page.

## How the Workforce Compensation Notifications Work

The following table describes:

- What action initiates the notification
- Who initiates and receives the notification
- Actions, if any, that are available to the notification receiver within the notification
- Conditions that cause the bypass of the notification

Notification	Initiating Action	Initiator	Receiver	Actions Available to the Receiver	Condition Causing Bypass of Notification
Budget Published	Manager's worksheet status changes from <b>Not Started</b> to <b>Budget Available</b>	Manager who published a budget to lower managers	Lower-level manager for whom a budget amount was published	Close	None
Worksheet Submitted	Manager's worksheet status changes to <b>Submitted</b>	Primary worksheet manager or switched manager who initiated the action	Manager one level up from sender in the plan hierarchy. If alternate approver exists, receiver is the alternate approver	Approve Reject	Submitting manager is the highest level approver in the hierarchy
Worksheet Returned for Correction	Manager's worksheet approval status changes to <b>Return for Correction</b>	Higher-level manager or user who switched to manager and returned lower manager's worksheet. This could be an alternate approver	Manager whose worksheet was returned for correction	Close	None

Notification	Initiating Action	Initiator	Receiver	Actions Available to the Receiver	Condition Causing Bypass of Notification
Worksheet Approved by Higher-Level Manager	Manager's worksheet status changes to <b>In Approvals</b>	Higher-level manager who approved using the submit notification or switched manager who initiated the action. The manager is not the final approver. This could be an alternate approver	Manager whose worksheet status changed to <b>In Approvals</b>	Close	Manager's worksheet access is <b>No Access</b>
Final Approval Obtained	Manager's worksheet status changes to <b>Fully Approved</b>	Top-level approver who approved a lower managers worksheet using the submit for approval notification or the approval action from the worksheet. This could be the top alternate approver	Manager whose worksheet is approved and all subordinate managers	Close	Manager's worksheet access is <b>No Access</b>
Plan Access Changed	Higher level manager selects <b>Change Access for All Managers</b> or <b>Change Access for Selected Managers</b> from the worksheet	Manager who changed another manager's plan access	Manager whose plan access was changed	Close	None
Worksheet Withdrawn	Manager clicks <b>Withdraw Submission</b>	Primary worksheet manager who previously submitted the worksheet	Approver who received the original worksheet submitted notification from a lower manager	Close	None
Budget Withdrawn	Manager clicks <b>Withdraw All Budgets</b> or <b>Withdraw Selected Budgets</b>	Manager who previously published a budget to a lower manager	Lower-level manager for whom a budget amount was previously published	Close	None
Due Date Changed	Manager changes a due date for an individual manager or selects <b>Change Due Date for All Managers</b> from the Action menu.	Higher-level manager or administrator	Lower-level manager whose worksheet due date changed	Close	None
Worksheet Overridden by Higher Manager	Manager or administrator changes a	Manager who modified an amount or administrator	Manager or administrator who	Close	None

Notification	Initiating Action	Initiator	Receiver	Actions Available to the Receiver	Condition Causing Bypass of Notification
	compensation amount column that was supplied by another manager, and clicks <b>Save</b>		originally supplied the amount.		
Request for Information	Manager selects one or more managers on the approval type tab, and clicks <b>Request Information</b>	Manager who requested information	Selected managers	Reply. This opens a dialog box to reply to the sender  Close	None
Delegate Worker	Manager selects one or more workers on the worksheet and selects <b>Delegate Workers</b> from the Action menu	Primary worksheet manager	Manager selected to review the workers.	Dismiss  Approve  Reject	None
Remove Worker Delegation	Manager selects one or more workers on the worksheet and selects <b>Remove Delegations</b> from the Action menu	Primary worksheet manager who previously delegated the workers.	Manager who was previously delegated the workers.	Dismiss  Approve  Reject	None

## Configuring the Tasks Pane of the Workforce Compensation Work Area: Explained

You configure the tasks pane using the Configure Global Settings task. You can edit the task name, enable or disable tasks, and specify the number of plans, budget pools, or models displayed.

### Task Name

The default task names appear as the task group titles in the Workforce Compensation work area tasks pane. When you change a task name, the edit also applies to default page names, as shown in the following table.

Task Name	Default Page Name
Compensate Workforce	Compensation Plans  Compensate Workforce
Manage Budgets	Budget Pools  Allocate Budgets

Task Name	Default Page Name
Model Compensation	Manage Compensation Models
	Create or Edit Compensation Model
Reports	Reports

## Enable Task

You can use the Enable Task option to enable or disable tasks in the Compensation work area. If you disable a task:

- The task doesn't appear in the tasks pane
- The links to the related compensation plans, budget pools, and models are not available

Examples:

- Hide the compensation task if you only use workforce compensation for off-cycle plan budgets. You enable the budget task and disable the other tasks
- Hide the budget task if you manage budgets internally. Line managers are only able to allocate compensation

## Objects Shown

You can change the quantity of compensation plans, budget pools, or models that appear in the group in the tasks pane.

Example: You change the default value of five objects to seven objects for the compensation task. Seven plans appear under the Compensate Workforce task. If more plans are available, you view the additional plans using the **More** link at the bottom of the list.

## FAQs

### Why did the default stock details change?

More than one administrator might have access to these settings. The following tasks use the stock price and currency information:

- View compensation history
- Manage workforce compensation
- Generate total compensation statements

## How can I configure the content that appears in the workforce compensation submit for approval notification?

You can use the Configure Worksheet Display task to configure the worksheet summary tables. The setup determines the content in the Compensation Summary, Performance Summary, and Promotions Summary sections of the notification.

You can use the BPM worklist composer to configure the Related Links and Comments sections content. You can't configure the Details and Summary sections content.

### *Related Topics*

- [Defining Approvals for Human Capital Management: Explained](#)

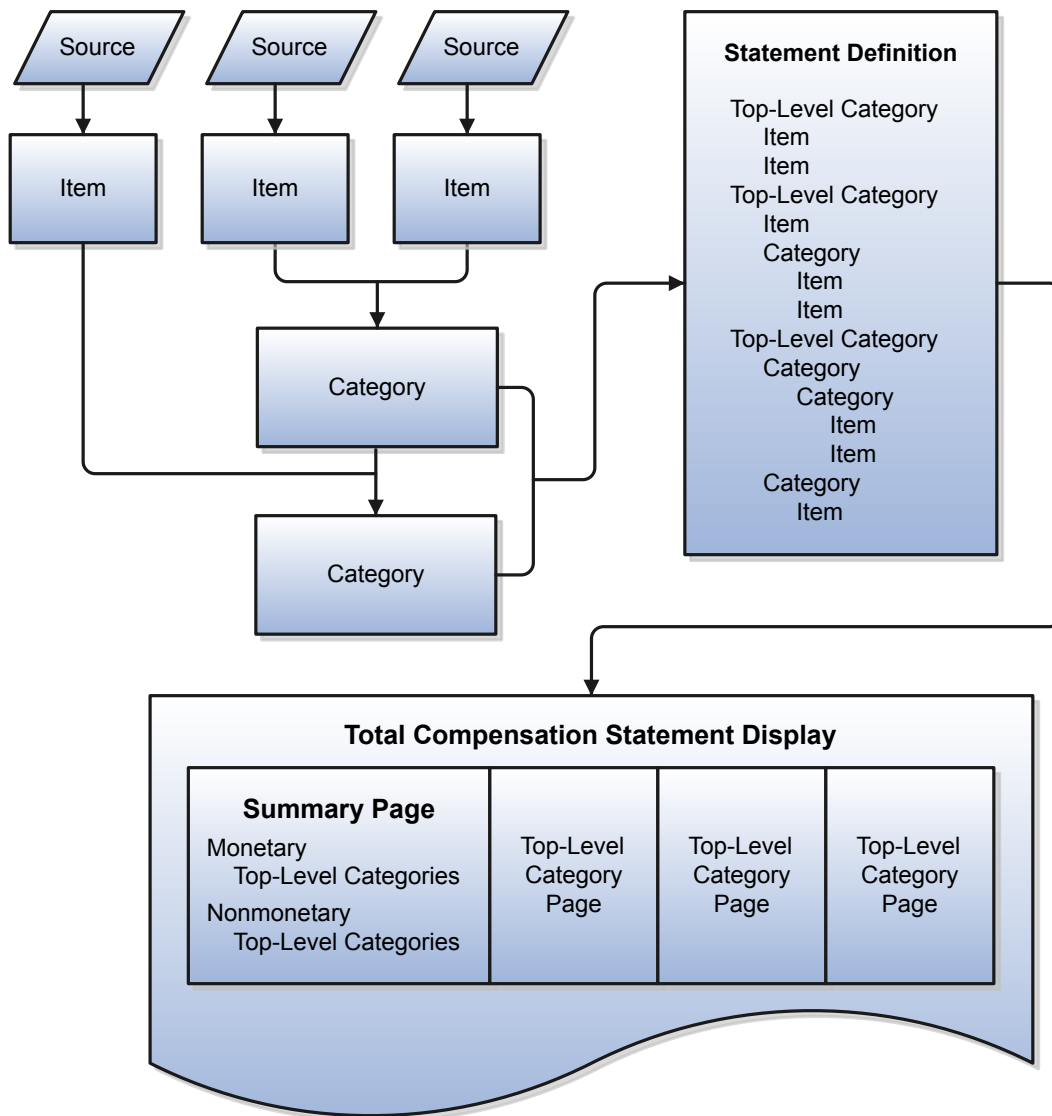




# 26 Total Compensation Statement Overview

## Overview

Configure the design, content, and delivery of a total compensation statement that includes pay such as base pay, variable compensation, fringe benefits, cost of benefits, and paid time off. The following figure shows the construction of a total compensation statement and how it displays items and categories.



To construct a total compensation statement, application implementors and compensation administrators:

1. Define compensation items that map to sources of estimated or actual amounts paid to workers or costs incurred by the company.

2. Arrange compensation items into categories such as cash compensation, base pay, benefits, or company stock.
3. Assemble categories into statement definitions.
  - Top-level categories in the statement definition appear in the optional summary page and as separate pages in the statement.
  - Display category details on a single page or enable recipients to drill to details in the statement.
  - Configure optional graphical displays of data, worker instructions, and supplemental information such as compensation policies or benefit plan details.
  - Define periods for which statement data is valid and customize an optional welcome message for each period.
4. Configure settings that control statement availability and the default stock price and currency used for estimated values.
5. Generate statements for review by compensation manager.
6. Make statements available for workers to view.
7. Purge unneeded statements and monitor processes with summary and detailed online reports.

To define total compensation statements, use the Total Compensation Statements task list in the Compensation work area.

### *Related Topics*

- [Compensation Items and Sources: Points to Consider](#)
- [Compensation Category Types: Explained](#)
- [Total Compensation Categories and Subcategories: Points to Consider](#)
- [Planning Total Compensation Statements: Points to Consider](#)

## Statement Definitions Explained

The statement definition acts as a template and determines the layout and content of the generated statement. The statement definition configures the display of compensation items added to compensation categories.

This topic explains:

- Statement definition approaches
- Reuse of statements and components
- Editing categories
- Statement display flexibility
- Iterative design process

## Statement Definition Approaches

You can create statement definitions using either of the following approaches:

- Create the item and category components as you build statement hierarchy.
- Define the item and category building block components first, and then associate them hierarchically.

The second approach promotes reuse of items and categories across multiple statements.

## Reuse of Statements and Components

You can:

- Include multiple legal employers, multiple countries, and multiple currencies in one statement.
- Add compensation items with sources that belong to different legal employers.
- Use the same categories in multiple statements.
- Reuse statement definitions by adding new statement periods and then modify the definition for subsequent periods.
- Duplicate a definition as the starting point for other definitions.

## Editing Categories

Edits to categories affect all statement definitions that use that category (as a category or subcategory). This applies whether you make the edits from the Manage Compensation Categories page or the Manage Statement Definitions page. Exception: Compensation category display names are local to the statement definition where you create or edit the name and don't impact the compensation category.

## Statement Display Flexibility

Top-level categories in the statement definition appear in the optional summary page and as separate pages in the statement.

The optional summary page:

- Provides workers with high-level view of their total compensation in graphs and tables
- Displays summed totals of top-level categories included in monetary and nonmonetary sections

Viewers can drill down to detailed category pages from the summary page or use regional area navigation links, depending on how you configure the category.

## Iterative Design Process

Configuring top-level compensation categories and statement definitions is an iterative process. You generate, view, purge, and regenerate your statements multiple times while editing category and statement definition and display options.

## Display Options in Statements

### Statement Display Options: Overview

You have many options to control the layout and display of tables and categories in total compensation statements. Additional options control graphic displays, descriptive text, and supplemental information. In general, you configure display options for:

- Category detail pages during category setup
- Top-level categories and the summary page during statement definition setup

The following table describes and compares the display options available when creating or editing compensation categories and compensation statement definitions.

Display Option	Category Setup	Statement Definition Setup
Hide table columns	Yes	Yes: summary page columns
Rename table columns	Yes	Yes: top-level categories only
Configure display of zero or no values	Yes	Yes: top-level categories only
Configure graph display	Yes	Yes: in summary page
Add descriptive text	Yes	Yes: in summary page
Add supplemental text	Yes	Yes: in summary page
Change vertical display order	Yes	Yes: in summary page
Hide regions for graphs or descriptions	Yes	Yes: in summary page
Exclude category from statement summary	No	Yes: top-level categories only
Hide or show estimated amount indicator	No	Yes
Include and hide statement summary page	No	Yes
Include and hide welcome message	No	Yes
Select printable statement options	No	Yes

## Hiding Columns

You can edit the column properties to hide a column in the category or statement summary page. When you hide a column, the data that the column would display isn't included in summary or detail tables or graphs.

### Hiding Columns

You can hide:

- Unused or not applicable columns, such as the worker contribution column in a cash compensation category
- Description columns

You can show a category's row in the statement even when it contains only zero values. However, you should show at least the Description column and enter an explanation, otherwise viewers see only a row of zeros. You can't hide all columns in a category if you configure the category level of details to show all details on a single category overview page.

## Displaying Zero or No Contribution Values

When you design categories for a statement, decide how to handle display when a worker has zero or no values to display during the statement period. You design categories using the Manage Compensation Categories task.

### Contribution Values

Zero or no values might occur when a worker:

- Did not received any stock options during the period
- Isn't participating in a compensation or benefit plan

The following table describes the zero or no value display options.

Statement Element	Display Options When All Contribution Values are Zero or No Value
Top-level categories page	<p>Do not display category if zero values or no values exist</p> <p>Display category if values are zero; hide if no value exists</p> <p>Always display the category page</p>
Stock subcategory rows	<p>Do not display row when no values exist or values are zeroes</p> <p>Display row if values are zeroes and allow subcategory drill</p> <p>Display and allow drill if historical values are over zero</p> <p>Always display the row and prevent drilling to subcategory</p> <p>Always display the row and allow drilling to subcategory</p>
Items in categories	<p>Do not display row when no values exist or values are zeroes</p> <p>Display row if values are zeroes; hide if no values exist</p> <p>Always display the row</p>

If you decide to display the row or category page with zero or no values, you can optionally compose a statement message to:

- Explain the lack of values
- Call attention to missed opportunities, such as participation in a stock purchase plan

## Displaying Graphs

You can display up to two graphs for each category. If you include a summary page in the statement, you can also include up to two graphs each in the Monetary and Nonmonetary sections of the summary.

For each graph that you decide to display, you must specify:

- Graph type: Pie chart or various types of bar chart

- Columns included in the graph: Worker contributions, company contributions, or both.

## Graphs: Restrictions

A graph must not include columns containing:

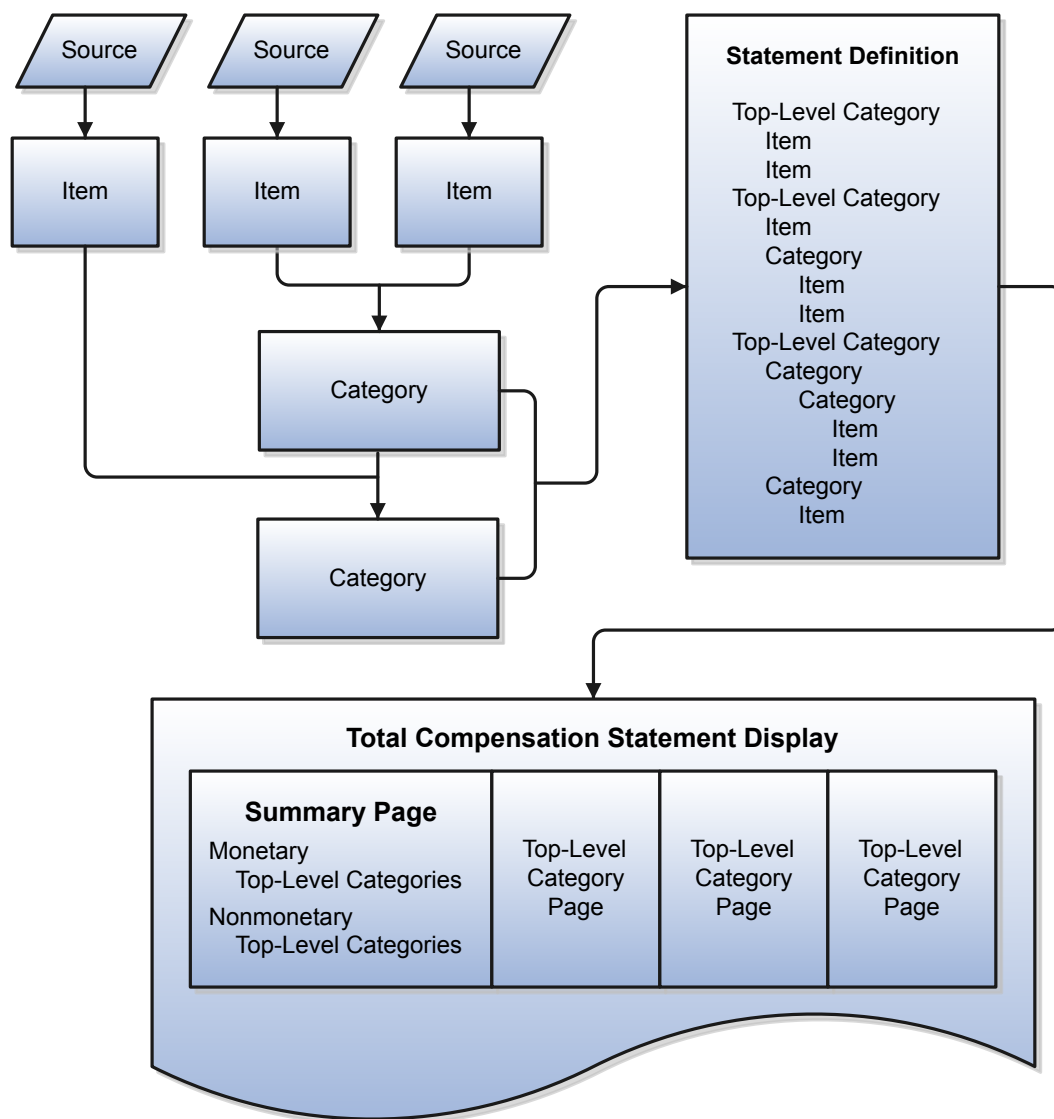
- Text or dates
- More than one nonmonetary unit of measure
- A combination of monetary and nonmonetary values

For example, a graph that mixes shares of stock, a company car, and fitness membership would not provide clear information.

# 27 Total Compensation Statement Components

## Overview

Configure the design, content, and delivery of a total compensation statement that includes pay such as base pay, variable compensation, fringe benefits, cost of benefits, and paid time off. The following figure shows the construction of a total compensation statement and how it displays items and categories.



To construct a total compensation statement, application implementors and compensation administrators:

1. Define compensation items that map to sources of estimated or actual amounts paid to workers or costs incurred by the company.
2. Arrange compensation items into categories such as cash compensation, base pay, benefits, or company stock.
3. Assemble categories into statement definitions.
  - o Top-level categories in the statement definition appear in the optional summary page and as separate pages in the statement.
  - o Display category details on a single page or enable recipients to drill to details in the statement.
  - o Configure optional graphical displays of data, worker instructions, and supplemental information such as compensation policies or benefit plan details.
  - o Define periods for which statement data is valid and customize an optional welcome message for each period.
4. Configure settings that control statement availability and the default stock price and currency used for estimated values.
5. Generate statements for review by compensation manager.
6. Make statements available for workers to view.
7. Purge unneeded statements and monitor processes with summary and detailed online reports.

To define total compensation statements, use the Total Compensation Statements task list in the Compensation work area.

#### Related Topics

- [Total Compensation Statement Definitions: Explained](#)

## Items and Sources: Points to Consider

Compensation items are the lowest level of compensation detail in the total compensation statement. Map each item to the specific source from which the statement retrieves compensation information. Items can hold monetary, nonmonetary, date, or text values. You can use them across statement definitions.

This topic explains the following significant aspects of compensation items:

- Source type
- Type of compensation and unit of measure
- Estimated values
- Rounding
- Relationship in the statement

### Source Type

Using the Manage Compensation Items task, you map compensation items to the source of the compensation to retrieve the compensation information. This table describes the source types and special data entry requirements for each.

Source Type	Description	Additional Data Entry Requirements
Benefit Balance	Compensation such as data obtained from a legacy compensation application entered as a one-time benefit balance.	<b>Type of Compensation</b>



Source Type	Description	Additional Data Entry Requirements
Element Entry	Compensation such as salary and bonus earnings retrieved from element entry.	<b>Legislative Data Group, Payroll Element, and Input Value</b>
External Data	Compensation such as data internal to the organization from another system, or data from a third party vendor.	<b>Record Type, Column, and Type of Compensation.</b>
Formula	Create a formula to retrieve compensation information that isn't stored in the other predefined source types.	<b>Type of Compensation, nonmonetary Unit of Measure, Rounding Rule, and Currency.</b> (Formula unit or currency overrides item definition)
Payroll Balance	Compensation such as commissions or company-paid taxes retrieved from payroll balance records.	<b>Legislative Data Group</b>

## Compensation Type and Unit of Measure

The compensation item inherits from the source:

- Default type of compensation, such as monetary or nonmonetary
- Monetary currency
- Nonmonetary unit of measure (UOM)

In some cases you can override the default compensation type and nonmonetary UOM when defining the item.

- If a formula that retrieves compensation also specifies currency or nonmonetary unit of measure, the formula configuration overrides the currency or unit selections in the item definition.
- The currency defined in the benefit balance overrides the currency on the item definition.

## Estimated Values

For each item, you can select the Estimated amount option to indicate that this compensation isn't the actual amount paid. In the statement definition, you can specify whether to display the estimated amount indicator for amounts designated as estimated.

## Rounding

You can specify how to round nonmonetary amounts.

## Items in the Statement Hierarchy

You can't add items to statement definitions directly. To include them on statements, you must add items to a compensation category.

### Related Topics

- [Using Formulas: Explained](#)

## Item Formula Type

The Total Compensation Item formula determines compensation information that isn't stored in the other predefined item source types. You select the formula when you manage compensation items on the Create or Edit Compensation Items page.

### Contexts

The following contexts are available to formulas of this type:

- DATE\_EARNED
- EFFECTIVE\_DATE
- END\_DATE
- START\_DATE
- HR\_ASSIGNMENT\_ID
- HR\_TERM\_ID
- JOB\_ID
- LEGISLATIVE\_DATA\_GROUP\_ID
- COMPENSATION\_RECORD\_TYPE
- ORGANIZATION\_ID
- PAYROLL\_ASSIGNMENT\_ID
- PAYROLL\_RELATIONSHIP\_ID
- PAYROLL\_TERM\_ID
- PERSON\_ID

### Database Items

Database items related to Person, Assignment, Salary, Element Entries, Compensation Record, and From and End Dates are available to formulas of this type.

### Input Variables

The following input variables are available to formula of this type.

Input Value	Data Type	Required	Description
CMP_IV_PERIOD_ID	Char	Y	Period ID
CMP_IV_PERIOD_START_DATE	Date	Y	Statement Period Start Date
CMP_IV_PERIOD_END_DATE	Date	Y	Statement Period End Date

## Return Values

The following return variables are available to formula of this type.

Return Value	Data Type	Required	Description
COMPENSATION_ DATES	Date	Y	One to 15 transaction dates delimited by semicolon, maximum 250 characters.
VALUES	Char	Y	One to 15 transaction values delimited by semicolon, maximum 250 characters. Must be the same number of values as dates.
ASSIGNMENTS	Char	N	One to 15 transaction assignments delimited by semicolon, maximum 250 characters. Must be the same number of assignments as dates. Can return an empty space with a delimiter (; ;).
LEGALEMPLOYERS	Char	N	One to 15 legal employer IDs delimited by semicolon, maximum 250 characters. Must be the same number of assignments as dates. Can return an empty space with a delimiter (; ;).
COMPENSATION_ DATES1	Date	Y	Second variable for transaction dates from 16 to 30 if limit of 250 characters is exceeded.
VALUES1	Char	Y	Second variable for transaction values from 16 to 30 if limit of 250 characters is exceeded.
ASSIGNMENTS1	Char	N	Second variable for transaction assignments from 16 to 30 if limit of 250 characters is exceeded.
LEGALEMPLOYERS1	Char	N	Second variable for legal employer IDs from 16 to 30 if limit of 250 characters is exceeded.
COMPENSATION_ DATES2	Date	Y	Transaction dates from 31 to 45.
VALUES2	Char	Y	Transaction values from 31 to 45.

Return Value	Data Type	Required	Description
ASSIGNMENTS2	Char	N	Transaction assignments from 31 to 45.
LEGALEMPLOYERS2	Char	N	Legal employers from 31 to 45.
COMPENSATION_DATES3	Dates	Y	Transaction dates from 46 to 60.
VALUES3	Char	Y	Transaction values from 46 to 60.
ASSIGNMENTS3	Char	N	Transaction assignments from 46 to 60.
LEGALEMPLOYERS3	Char	N	Legal employers from 46 to 60.

## Sample Formula

This sample formula returns one date and one value based on the worker ID.

```

/*****
FORMULA NAME : Total Compensation Simple Item Formula
FORMULA TYPE : Total Compensation Item
DESCRIPTION : Returns one date and one value.
*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_PERSON_ID (text), CMP_IV_PERIOD_START_DATE (date), CMP_IV_PERIOD_END_DATE (date)
DEFAULT FOR CMP_IV_PERSON_ID IS '-1'
DEFAULT FOR CMP_IV_PERIOD_START_DATE IS '4712/12/31' (date)
DEFAULT FOR CMP_IV_PERIOD_END_DATE IS '4712/12/31' (date)
/*===== INPUT VALUES DEFAULTS ENDS =====*/

/*===== FORMULA SECTION BEGIN =====*/
COMPENSATION_DATES = '2005/01/01'
VALUES = '500.00'

RETURN COMPENSATION_DATES, VALUES

/*===== FORMULA SECTION END =====*/

```

This sample formula returns multiple variables.

```

/*****
FORMULA NAME : Total Compensation Multi Item Formula
FORMULA TYPE : Total Compensation Item
DESCRIPTION : Returns multiple variables.
*****/

/*===== INPUT VALUES DEFAULTS BEGIN =====*/
INPUTS ARE CMP_IV_PERSON_ID (text), CMP_IV_PERIOD_START_DATE (date) , CMP_IV_PERIOD_END_DATE (date)
/*===== INPUT VALUES DEFAULTS ENDS =====*/

/*===== FORMULA SECTION BEGIN =====*/

COMPENSATION_DATES = '2009/01/01;2009/02/01;2009/03/01'
COMPENSATION_DATES1 = '2009/07/01;2009/08/01;2009/09/01'
COMPENSATION_DATES2 = '2009/10/01;2009/11/01;2009/12/01'

```

```

COMPENSATION_DATES3 = '2009/10/01;2009/11/01;2009/12/01'

VALUES = '200.00;200.00;300.00'
VALUES1 = '300.00;500.00;500.00'
VALUES2 = '500.00;500.00;600.00'
VALUES3 = '600.00;600.00;700.00'

/* Returns only first two assignment */
ASSIGNMENTS = ',1234567890;1234567890'
ASSIGNMENTS1 = '1234567890;1234567890;1234567890'

/* Returns last two assignments */
ASSIGNMENTS2 = ',1234567890;1234567890'
/* Returns first and last assignments */
ASSIGNMENTS3 = '1234567890;;1234567890'

LEGALEMPLOYERS = '0123456789;;0123456789'
LEGALEMPLOYERS1 = '0123456789;0123456789;0123456789'
LEGALEMPLOYERS2 = '0123456789;0123456789;0123456789'
LEGALEMPLOYERS3 = '0123456789;0123456789'

RETURN
COMPENSATION_DATES,VALUES,COMPENSATION_DATES1,VALUES1,COMPENSATION_DATES2,VALUES2,COMPENSATION_DATES3,VALUES3,ASSIGNMENTS,ASSIGNMENTS1,ASSIGNMENTS2,ASSIGNMENTS3,LEGALEMPLOYERS,LEGALEMPLOYERS1,LEGALEMPLOYERS2,LEGALEMPLOYERS3

/*===== FORMULA SECTION END =====*/

```

## Category Types: Explained

The compensation category type determines the table columns and general layout of the category page in the total compensation statement, as well as whether the category can include subcategories. This topic explains the category types and provides an example of a custom category.

### Types

The following table shows the category types with default column and configuration details.

Category Type	Default Columns	Configurable
<ul style="list-style-type: none"> <li>• Benefits</li> <li>• Cash Compensation</li> <li>• Savings</li> <li>• Retirement</li> </ul>	<ul style="list-style-type: none"> <li>• Worker contributions</li> <li>• Employer contributions</li> <li>• Description</li> </ul>	<ul style="list-style-type: none"> <li>• Add compensation items</li> <li>• Nest categories within the category as subcategories</li> <li>• Hide columns that don't apply</li> </ul>
Time Off	<ul style="list-style-type: none"> <li>• Type of time off</li> <li>• Monetary value of the time off</li> <li>• Accrued balance</li> </ul>	<ul style="list-style-type: none"> <li>• Edit column labels</li> <li>• Configure category table row names as links to more information</li> <li>• Can't nest categories as subcategories</li> </ul>
Stock History	Up to 27 columns of data from the database table that stores workers' stock details	<ul style="list-style-type: none"> <li>• Select which types of stock to include in the category</li> <li>• Alter which columns are hidden or only available optionally in statement view menu</li> </ul>

Category Type	Default Columns	Configurable
		<ul style="list-style-type: none"> <li>Edit column labels</li> <li>Can't nest categories as subcategories</li> </ul>
Other	Same basic structure as the Cash Compensation or Benefits category type	You can use it for any type of compensation
Custom	Specify the number of columns, up to five, that you want to include in the category	<ul style="list-style-type: none"> <li>Configure column labels</li> <li>Select compensation items for the table rows</li> <li>Can't nest categories as subcategories</li> </ul>

## Custom Category Example

You might use the custom category type to display information about commissions by including columns, such as:

- Sales target
- Units sold
- Percentage over target
- Percentage under target
- Commission amount

## Categories and Subcategories: Points to Consider

Compensation categories display information in tables. Use categories to group similar or related compensation items, such as Cash Compensation, Benefits, Time Off, or Stock History. You can use the same categories in multiple statements. You can also display categories directly on the summary page, or nest them to make subcategories.

Consider the following factors when planning how to group compensation items and categories for display:

- Category type
- Contribution type and unit of measure
- Level of detail

## Category Type

Consider these points:

- Category type determines the table columns and general layout of the page in the statement.
- You can't add categories as subcategories to the Stock History, Custom, or Time Off category types.
- After you use a category in any statement, you can't change the category type.

## Contribution Type and Unit of Measure

The contribution type and unit of measure of the associated items or subcategories determines:

- Category's contribution type (monetary or nonmonetary)
- Category's nonmonetary unit of measure

All items and subcategories within a nonmonetary category must share the same unit of measure.

## Level of Detail

When you create a category, you specify how you want to display the category details in the statement.

Select one of these level of detail values:

- Viewers drill into line items to see details
- Viewers see all details on one page

### *Related Topics*

- [Hiding Columns in the Total Compensation Statement: Points to Consider](#)
- [Displaying Zero or No Contribution Values in the Compensation Statement: Critical Choices](#)
- [Displaying Graphs in Total Compensation Statement: Explained](#)

## Category Level of Detail: Points to Consider

Use the Manage Compensation Categories task in the Compensation work area to specify how to display the category details in the statement. Select from two level of display options, depending on category type and design preference.

### Viewers Drill Into Line Items to See Details

Provide links from a high-level category page that drill down to specific details for each item or subcategory row in the category.

Example: You can create a Benefits category that displays high-level information for different health benefits, such as:

- Medical
- Dental
- Life Insurance

To see the details of each row in the category, such as medical, viewers can drill into the row to a separate details page.

### Viewers See All Details on One Page

Display the full detail of the category's content on a single page in the statement. For example, you can create a Bonus category that displays the amount of different bonuses (such as new hire and quarterly) as rows on the category page.

If you select to show all details on a single page:

- The name column doesn't show in the statement for rows in the category.

- You can't hide all columns in the category.
- You can't add subcategories to these category types: Benefits, Cash Compensation, Savings and Retirement, or Other. However, you can add subcategories to these category types if the level of detail enables drilling to see details.

It's best not to show all details on a single page for recurring information.

## Planning Statement Definitions: Points to Consider

Consider these statement elements and options when you plan how many different total compensation statement definitions to create and the presentation of content in each:

- Statement audience
- Statement definition details
- Statement periods

### Statement Audience

You can create different statement definitions for different statement audiences. Use the following two methods, individually or in combination, to limit the statement audience:

- Attach an eligibility profile to the statement on the Statement Options tab.  
Example: Within a business unit, you create separate statement definitions for individual contributors and executive level workers by:
  - a. Creating eligibility profiles that differentiate between individual contributors and executive workers.
  - b. Attaching each eligibility profile to the corresponding statement definition.
- Use the following population filter parameters to specify your audience when you generate statements:
  - Business unit
  - Benefits group
  - Legislative data group
  - Country
  - A person selection formula that you define
  - A single person that you select

### Statement Definition Details

Build the statement hierarchy of categories and items appropriate for the audience. Configure table and graphical displays, descriptive text, and supplemental information.

### Statement Periods

Configure statements to cover any period of time by specifying start and end dates on the statement definition Periods tab. You can create multiple periods at one time. For each statement period, further specify:

- An optional statement period display name



Example: Name the period **2011 Annual Statement** rather than the default display of start and end date.

- The date that statements become available to workers
- The conversion rate date for currency conversions
- An optional welcome message.

## Statement Options: Points to Consider

You can configure an optional summary page, estimated amount indicator, and welcome message for each statement.

### Summary Page

On the statement definition Options tab, you can configure the summary page. The optional summary page consists of the following optional features:

- Monetary and Nonmonetary sections, each containing section-level descriptive text, graphs, and tables
- Summary page descriptive text that can include rich text formatting and hyperlinks
- Summary page supplemental information, such as hyperlinks to company policies and resources, which are displayed in a separate window

If you include a graph in the Nonmonetary section, all top-level categories in the nonmonetary summary should share the same unit of measure. You can exclude individual top-level categories from the summary.

### Estimated Amount Indicator

Displaying an estimated amount indicator in the statement requires two configuration steps:

- Item definition: When creating compensation items, identify whether the item amounts are estimates.
- Statement definition: On the statement definition Options tab, specify whether to display or hide the indicator that visually denotes amounts as estimated.

### Welcome Message

For each statement period, you can compose an optional welcome message on the statement definition Periods tab. In the welcome message you can:

- Personalize the greeting with each worker's name
- Use rich text and include hyperlinks

If included, the welcome message is the first page the worker sees in the statement.

## FAQs

## How can I change whether the category displays zero or no values in the statement?

Edit the top-level category only on the Edit Statement Definition page. Or, edit the subcategory and item rows on the Edit Compensation Categories page. Follow these steps:

1. Select the category or item row.
2. Select the zero value display option in the Actions menu.

The **Display Zero Rows** column shows the current setting for each category.

## How can I display a hidden column?

Edit the summary table column properties only on the summary page. Or, edit each individual category's column properties on the Edit Compensation Category page. Follow these steps:

1. Click the **Column Properties** button.
2. Select the column from the menu.
3. Update the option to display the column in the statement.

## How can I hide or show the welcome message in statements?

Follow these steps using the Manage Statement Definitions task in the Compensation work area:

1. Select the statement definition and click **Edit**.
2. On the Periods tab, select the button in the **Welcome Message** column.
3. Edit the **Do not display welcome message** option.

## How can I change the welcome message text in statements?

Follow these steps using the Manage Statement Definitions task in the Compensation work area:

1. Select the statement definition and click **Edit**.
2. On the Periods tab, select the **Edit** button in the **Welcome Message** column.

## Why can't I delete or edit some items?

If the item is in use in a compensation category, you can't delete it. Also, you can't edit some attributes, such as the type of compensation and nonmonetary unit of measure.

## Why did the default stock details change?

More than one administrator might have access to these settings. The following tasks use the stock price and currency information:

- View compensation history
- Manage workforce compensation
- Generate total compensation statements

## How can I import stock data sent to me by my supplier?

On the Manage Stock Grants page, use the **Prepare Import Spreadsheet** button to generate the stock table spreadsheet. Enter your supplier's data, ensuring that each row contains a unique Grant Date, Grant ID, and Grant Number. Upload the information into the stock table.

## Can I reuse a previous year's statement?

Yes. You can reuse an existing statement definition by adding new periods. You might also want to:

- Update the welcome message
- Add or edit the items and categories included
- Hide or update the display of graphs, descriptive text, and supplementary information

## Can I correct the definition after workers received statements?

Yes. You can correct the statement definition and regenerate the statements, which makes the newer version available to workers.



# 28 Total Compensation Worked Examples

## Creating a Bonus Category: Worked Example

This example demonstrates how to create a bonus category that includes a profit sharing bonus, a new hire bonus, and a quarterly bonus. The new hire and quarterly bonus items already exist and are reused in this category.

The following table summarizes key decisions for the Profit Sharing compensation item in this scenario.

Decision to Consider	Item in This Example
What compensation does the item represent?	Profit sharing bonus
What's the source type?	Payroll element
What's the legislative data group?	USA

The following table summarizes key decisions for the category in this scenario.

Decision to Consider	Category in This Example
What's the category type?	Cash Compensation
Display category details in the statement at what level?	Viewers see all details on one page.
Add items?	Yes: Profit sharing bonus, new hire bonus, and quarterly bonus.
Display graphs? How many? What type?	Yes. Two: Bar and stacked bar.
Hide or edit any columns in the category?	Hide worker contributions because this is a cash compensation category. Edit company contribution column name to make it familiar to workers.

## Task Summary

To create the bonus category, complete the following tasks. Use the default values except where otherwise indicated.

1. Create a profit sharing bonus item.
2. Create a bonus category.
3. Attach the item you created along with other existing bonus items.
4. Configure display options.

## Prerequisites

1. Create a payroll element named Profit Sharing Bonus using the USA legislative data group.
2. Create the following compensation items using payroll elements in the USA legislative data group:
  - o New Hire Bonus
  - o Quarterly Bonus

## Creating a Compensation Item

Create the compensation item.

1. Click the **Manage Compensation Items** task.
2. Click **Create**.
3. Complete the fields as shown in this table:

Field	Value
<b>Item Name</b>	Profit Sharing Bonus
<b>Source Type</b>	Element entry
<b>Legislative Data Group</b>	USA
<b>Payroll Element</b>	Profit Sharing Bonus
<b>Input Value</b>	Pay Value

4. Click **Save and Close**.

## Entering Category Details and Adding Items

1. Click the **Manage Compensation Categories** task.
2. Click **Create**.
3. Complete the fields, as shown in this table.

Field	Value
<b>Name</b>	Bonus
<b>Category Type</b>	Cash Compensation

4. Click **Continue**.
5. Select **Viewers see all details on one page** in the **Level of Detail** field.

6. Click **Add Items** three times to add three new rows.
7. Complete the fields for each new row as shown in this table.

Name	Description	Company Contribution (Items)
Profit Sharing	Profit Sharing Bonus	Profit Sharing Bonus
New Hire	New Hire Bonus	New Hire Bonus
Quarterly	Quarterly Bonus	Quarterly Bonus

8. Click **Edit Column Properties** and select the **Your Contribution** column.
9. Select **Do not display in the statement**.
10. Click **OK**.
11. Click **Edit Column Properties** and select the **Company Contribution** column.
12. Enter **Amount** in the **Column Label** field.
13. Click **OK**.

## Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

Field	Value for the First Graph	Value for the Second Graph
<b>Graph Title</b>	Your Bonuses	How Your Bonuses Add Up
<b>Graph Type</b>	Bar	Bar - stacked
<b>Graph Items</b>	Amount	Amount

3. Click **Save**.
4. Click **OK** in the confirmation.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what's included in this category or details about policies, and format it appropriately.
7. Click **Reorder Components** at the top of the page.
8. Select **Descriptive Text** and click the downward arrow until **Descriptive Text** appears below **Graphs**.
9. Click **OK**.
10. Click **Save and Close**.

## Creating a Benefits Category: Worked Example

This example demonstrates how to create a benefits category that includes medical, dental, vision, disability insurance, and life insurance. The following table summarizes key decisions for the compensation items in this scenario.

Decision to Consider	First Item	Second Item
What compensation does the item represent?	Worker contribution for medical benefit	Company contribution for medical benefit
What is the source type?	Payroll element	Payroll element
What is the legislative data group?	USA	USA

The following table summarizes key decisions for the category in this scenario.

Decision to Consider	Category in This Example
What is the category type?	Benefits
Display category details in the statement at what level?	Display details of item rows on separate pages that viewers drill to for details.
Add items? (Describe)	Yes: Both worker and company contributions for medical, dental, vision, disability insurance, and life insurance benefits.
Add other categories as subcategories? Describe	No
Display graphs? (No or Yes?) One or two? What type?	Yes. Two: Stacked bar and pie chart.
Hide or edit any columns in the category?	No
Display the row if values are zero in the period?	No

Create items for medical insurance, then create a benefits category and attach the items you created along with eight existing benefits items and configure display options. Use the default values except where otherwise indicated.

## Prerequisites

1. Create the following payroll elements using the USA legislative data group.
  - o Medical Worker Contribution
  - o Medical Company Contribution
2. Create the following compensation items using payroll elements in the USA legislative data group:
  - o Dental Worker Contribution
  - o Dental Company Contribution
  - o Vision Worker Contribution



- Vision Company Contribution
- Disability Worker Contribution
- Disability Company Contribution
- Life Insurance Worker Contribution
- Life Insurance Company Contribution

## Creating a Compensation Item

Use the default values except where indicated.

1. In the Compensation work area, click **Manage Compensation Items** to open the Manage Compensation Items page.
2. Click **Create**.
3. On the Create Compensation Item page, complete the fields as shown in this table:

Field	Value
<b>Item Name</b>	Medical Worker Contribution
<b>Source Type</b>	Element entry
<b>Legislative Data Group</b>	USA
<b>Payroll Element</b>	Medical Worker Contribution
<b>Input Value</b>	Pay Value

4. Click **Save and Create Another**.
5. On the Create Compensation Item page, complete the fields as shown in this table:

Field	Value
<b>Item Name</b>	Medical Company Contribution
<b>Source Type</b>	Element entry
<b>Legislative Data Group</b>	USA
<b>Payroll Element</b>	Medical Company Contribution
<b>Input Value</b>	Pay Value

6. Click **Save and Close**.

## Entering Category Details and Adding Items

1. In the Compensation work area, click **Manage Compensation Categories** to open the Manage Compensation Categories page.
2. Click **Create**.
3. On the Create Compensation Categories page, complete the fields, as shown in this table.

Field	Value
<b>Name</b>	Benefits
<b>Category Type</b>	Benefits

4. Click **Continue**.
5. On the Create Category page, Table tab, select **Viewers drill into line items to see details** in the **Level of Detail** field.
6. Click **Add Items** five times to add five new rows.
7. Complete the fields for each new row, entering a name and description of the category row and selecting compensation items for each contribution column in the category, as shown in this table.

Name	Description	Your Contribution (Items)	Company Contribution (Items)
Medical	Amounts reflect your coverage.	Medical Worker Contribution	Medical Company Contribution
Dental	Amounts reflect your coverage.	Dental Worker Contribution	Dental Company Contribution
Vision	Amounts reflect your coverage.	Vision Worker Contribution	Vision Company Contribution
Disability Insurance	LTD provides income protection.	Disability Worker Contribution	Disability Company Contribution
Life Insurance	Life insurance is a core benefit.	Life Insurance Worker Contribution	Life Insurance Company Contribution

## Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

Field	Value for the First Graph	Value for the Second Graph
<b>Graph Title</b>	Employee Versus Company Contributions	Total Contribution Comparison
<b>Graph Type</b>	Bar	Pie

Field	Value for the First Graph	Value for the Second Graph
Graph Items	Your Contribution, Company Contribution	Your Contribution, Company Contribution

3.

Click **Save**.
4.

Click **OK** in the confirmation.
5.

Select the Descriptive Text tab.
6.

Enter any text here to describe what is included in this category or details about policies, and format it appropriately.
7.

Click **Reorder Components** at the top of the page.
8.

Select **Descriptive Text** and click the downward arrow until **Descriptive Text** appears below **Graphs**.
9.

Click **OK**.
10.

Click **Save and Close**.

# Creating a Custom Category for Commissions: Worked Example

This example demonstrates how to create a Commissions category using the Custom category type. The following table summarizes key decisions for the category in this scenario.

Decision to Consider	Category in This Example
What is the category type?	Custom
Display category details in the statement at what level?	Viewers see all details on one page.
Add items?	Yes: Sales target, sales revenue, and commissions items for year end.
Display graphs? How many? What type?	Yes. Two bar charts, one for revenue generated and one for commissions earned.
Hide or edit any columns in the category?	Edit column labels.

## Task Summary

To create the custom category for commissions complete the following tasks. Use the default values except where otherwise indicated.

1.

Create a Custom category.
2.

Attach existing compensation items.
3.

Configure display options.

## Prerequisites

1. Create the following compensation items:
  - o Sales Target Year End
  - o Sales Revenue Year End
  - o Commission Year End

## Entering Category Details and Adding Items

1. Click the **Manage Compensation Categories** task.
2. Click **Create**.
3. Complete the fields, as shown in this table.

Field	Value
<b>Name</b>	Commissions
<b>Category Type</b>	Custom
<b>Number of Item Columns</b>	3

4. Click **Continue**.
5. Select **Viewers see all details on one page** in the **Level of Detail** field.
6. Click **Edit Column Properties** and select the **Your Contribution** column.
7. Enter **Sales Target** in the **Column Label** field.
8. Click **OK**.
9. Click **Edit Column Properties** and select the **Company Contribution** column.
10. Enter **Sales Revenue** in the **Column Label** field.
11. Click **OK**.
12. Click **Edit Column Properties** and select the **Custom Column 3** column.
13. Enter **Commission** in the **Column Label** field.
14. Click **OK**.
15. Click **Add Items**.
16. Complete the fields for the new row, as shown in this table.

Name	Description	Sales Target (Item)	Sales Revenue (Item)	Commission (Item)
Row 1	Year End Activity	Sales Target Year End	Sales Revenue Year End	Commission Year End

The **Name** column doesn't show in the statement when the level of detail is configured to display all details on a single page.

## Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

Field	Value for the First Graph	Value for the Second Graph
<b>Graph Title</b>	Revenue Generated	Commissions Earned
<b>Graph Type</b>	Bar	Bar
<b>Graph Items</b>	Sales Revenue	Commissions

3. Click **Save**.
4. Click **OK** in the confirmation.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what's included in this category or details about policies, and format it appropriately.
7. Click **Reorder Components** at the top of the page.
8. Select **Descriptive Text** and click the downward arrow until **Descriptive Text** appears below **Graphs**.
9. Click **OK**.
10. Click **Save and Close**.

## Creating a Stock History Category: Worked Example

This example demonstrates how to create a stock history category for nonqualified stock options with vesting information. You create a stock history category and configure column visibility and graphs.

The following table summarizes key decisions for the category in this scenario.

Decision to Consider	Category in This Example
What's the category type?	Stock History
Display category details in the statement at what level?	Viewers see all details on one page.
Display graphs? How many? What type?	Yes. One: Bar.
Hide or edit any columns in the category?	Accept most default column visibility settings. Make some adjustments to visibility of vested share columns and grant number. Edit some column labels for display on the statement.

## Task Summary

To create the stock history category, complete the following tasks:

1. Create a stock history category and configure the columns.
2. Configure the display options.

The Stock Details table must contain stock data. Use the default values except where otherwise indicated.

## Entering Category Details and Configuring Columns

1. Click the **Manage Compensation Categories** task.
  2. Click **Create**.
  3. Complete the fields, as shown in this table.
- | Field                | Value         |
|----------------------|---------------|
| <b>Name</b>          | Stock History |
| <b>Category Type</b> | Stock History |
4. Click **Continue**.
  5. Select **Non-Qualified Stock Option** in the **Grant Type** field.
  6. Edit the column labels and availability of column types, as shown in this table, using the default values of columns not listed.

Sequence	Column Type	Column Label	Available for Display
1	Original Grant Date	Grant Date	(Use default)
3	Grant Number	(Use default)	Select
10	Original Value at Grant	Grant Value	(Use default)
16	Estimated Market Value of Total Shares	Estimated Market Value	(Use default)
17	Vested Shares	(Use default)	Select
18	Exercised Shares	(Use default)	Select
20	Estimated Gain from Vested Shares	(Use default)	Deselect

## Configuring Display Options.

1. Select the Graphs tab.
2. Complete the fields, as shown in this table.

Field	Value for the First Graph
<b>Graph Title</b>	Vested Versus Unvested Shares
<b>Graph Type</b>	Bar
<b>Nonmonetary Graph Items</b>	Vested Shares, Unvested Shares

3. Click **Save**.
4. Click **OK** in the confirmation.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what's included in this category or details about policies, and format it appropriately.
7. Click **Reorder Components** at the top of the page.
8. Select **Descriptive Text** and click the downward arrow until **Descriptive Text** appears below **Graphs**.
9. Click **OK**.
10. Click **Save and Close**.

## Creating a Statement: Worked Example

This example demonstrates how to create, generate, and view a total compensation statement that contains two top-level categories, one for cash compensation and one for stock. The statement definition is for individual contributors whose salaries are quoted on an annual basis. The categories added as subcategories were created for other statement definitions and are reused in this definition. The following table summarizes key decisions for the compensation item in this scenario.

Decision to Consider	Item in This Example
What compensation does the item represent?	Base pay for exempt workers with annual salary
What's the source type?	Payroll element
What's the legislative data group?	USA

The following table summarizes key decisions for the categories in this scenario.

Decision to Consider	Cash Compensation Category	Stock Category
What is the category type?	Cash Compensation	Other

Decision to Consider	Cash Compensation Category	Stock Category
Display category details in the statement at what level?	Display details of item and subcategory rows on separate pages that viewers drill to for details.	Display details of item and subcategory rows on separate pages that viewers drill to for details.
Add items?	Yes: Base pay for exempt workers	Not directly, only through subcategories.
Add other categories as subcategories?	Yes. One: Bonuses Exempts	Yes. Two: ESPP Exempts and Stock History Exempts
Display graphs? How many? What type?	Yes. Two: Bar and stacked bar.	No
Hide or edit any columns in the category?	Hide worker contributions because this is a cash compensation category. Edit subcategory names to make them familiar to workers.	Edit subcategory names to make them familiar to workers.
Display the row if values are zero or no in the period?	No	Display the Employee Stock Purchase Plan row but prevent drilling to details.

The following table summarizes key decisions for the statement definition in this scenario.

Decision to Consider	Statement Definition in This Example
Include which top-level categories?	Cash Compensation and Stock
What is the statement period?	Calendar year 2015 Also create a second annual period to be ready for the next year.
Include welcome message?	Yes. Address recipients by first name.
Include summary page?	Yes
What is the statement audience for eligibility?	Individual contributors whose salaries are quoted on an annual basis
What is the population for statement generation?	Legal employer: Infusion USA

## Task Summary

To create, generate, and view a total compensation statement complete the following tasks. Use the default values except where otherwise indicated.

1. Create a compensation item.
2. Create a cash compensation category and add the item and a subcategory.



3. Create a stock category and add subcategories.
4. Create a statement definition.
5. Configure optional eligibility and statement summary page.
6. Generate and view statements.

## Prerequisites

1. Create a payroll element named **Base Pay Exempts** that represents base pay earnings for salaried exempt workers in the USA legislative data group.
2. Create the following compensation categories with items:
  - o Bonuses Exempts
  - o ESPP Exempts
  - o Stock History
3. Create an eligibility profile named **IC Annual Salary** that identifies individual contributors who are salaried with annual salary basis.

## Creating a Compensation Item

Create the compensation item.

1. Click the **Manage Compensation Items** task.
2. Click **Create**.
3. Complete the fields as shown in this table:

Field	Value
<b>Item Name</b>	Base Pay Exempts
<b>Source Type</b>	Element entry
<b>Legislative Data Group</b>	USA
<b>Payroll Element</b>	Base Pay Exempts
<b>Input Value</b>	Pay Value

4. Click **Save and Close**.

## Creating a Cash Compensation Category

Create a cash compensation category and attach the base pay item you created along with two existing cash categories with items.

1. Enter category details and add an item.

2. Add and configure subcategories.
3. Configure display options.

## 1. Enter category details and add an item.

1. Click the **Manage Compensation Categories** task.
2. Click **Create**.
3. Complete the fields, as shown in this table.

Field	Value
<b>Name</b>	Cash Compensation
<b>Category Type</b>	Cash Compensation

4. Click **Continue**.
5. Select **Viewers drill into line items to see details** in the **Level of Detail** field.
6. Click **Add Items**.
7. Complete the column fields in the new row, as shown in this table.

Column	Value
<b>Name</b>	Salary
<b>Description</b>	Base pay amounts
<b>Company Contribution</b>	Base Pay Exempts

8. Click **Edit Column Properties** and select the **Your Contribution** column.
9. Select **Do not display in the statement**.
10. Click **OK**.
11. Click **Edit Column Properties** and select the **Company Contribution** column.
12. Enter **Amount** in the **Column Label** field.
13. Click **OK**.

## 2. Add and configure a subcategory.

1. Click **Add Subcategory**.
2. Select **Bonuses Exempts**.
3. Click **Apply**.
4. Click **Done**.
5. Complete the fields, as shown in this table, for the new category row.

Column	Value
<b>Name</b>	Bonuses

Column	Value
<b>Description</b>	Lump sum compensation amounts

6. Click **Save**.
7. Click **OK**.

### 3. Configure display options.

1. Select the Graphs tab.
2. Complete the fields for two graphs, as shown in this table.

Field	Value for Graph 1	Value for Graph 2
<b>Graph Title</b>	Your Cash Awards	Total Cash Compensation
<b>Graph Type</b>	Bar	Bar - stacked
<b>Graph Items</b>	Amount	Amount

3. Click **Save**.
4. Click **OK**.
5. Select the Descriptive Text tab.
6. Enter any text here to describe what's included in this category or details about the compensation policies, and format it appropriately.
7. Click **Reorder Components** at the top of the page.
8. Select **Descriptive Text** and click the downward arrow until **Descriptive Text** appears below **Graphs**.
9. Click **OK**.
10. Click **Save and Close**.

## Creating a Stock Category

Create a stock category and attach two existing stock categories with items.

1. Enter category details.
2. Add and configure subcategories.
3. Configure display options.

### 1. Enter category details.

1. Click **Create**.
2. Complete the fields, as shown in this table:

Field	Value
<b>Category Name</b>	Stock Awards
<b>Category Type</b>	Other

3. Click **Continue**.
4. Select **Viewers drill into line items to see details** in the **Level of Detail** field.

## 2. Add and configure subcategories.

1. Click **Add Subcategory**.
2. Select the row for **ESPP Exempts**.
3. Hold down the **Control** key and select the **Stock History Exempts** row.
4. Click **Done**.

## 3. Configure display options.

1. Edit the subcategory names as shown in this table:

Column	Stock History Category	ESPP Category
<b>Name</b>	Stock Options	Employee Stock Purchase Plan

2. Click **Edit Column Properties** and select the **Company Contributions** column.
3. Change the column label to **Stock Award**.
4. Click **OK**.
5. Select the Employee Stock Purchase Plan row.
6. On the **Action** menu, select **Configure Zero or No Value Behavior of Row**.
7. Complete the fields as shown in this table:

Field	Value
<b>Zero Contributions Display</b>	Always display the row
<b>Alert Message</b>	Enter any text to display when workers have no stock to display.

8. Click **OK**.
9. Click **Save and Close**.

## Creating a Statement Definition

Create a statement definition and configure the statement table display, periods, and welcome message.

1. Enter statement details and add top-level categories.
2. Configure table display options.
3. Define statement periods and welcome message.

### 1. Enter statement details and add top-level categories.

1. Click the **Manage Statement Definitions** task.
2. Click **Create**.
3. Enter any name for the statement, such as **2015 Annual Statement**.
4. Click **Continue**.
5. Enter any description of the statement.
6. Click **Add Category**.
7. Select the two categories that you created: **Cash Compensation** and **Stock**.
8. Click **Apply**.
9. Click **Done**.

### 2. Configure table display options.

1. In the Details tab, edit the top-level category names in the **Display Name** column to make the names more familiar to workers.
2. In the **Description** column, add descriptions that display in the statement, as needed.
3. Select **Reorder Top-Level Categories in Statement** from the **Actions** menu.
4. Select the first category and use the downward arrow to place it after the other category.
5. Click **OK**.
6. Click **Save**.
7. Click **OK**.

### 3. Define statement periods and welcome message.

1. Select the Statement Periods tab.
2. Click **Add**.
3. Complete the fields to create two annual periods, as shown in this table:

Field	Value
<b>Start Date</b>	01-Jan-2015
<b>End Date</b>	31-Dec-2015

Field	Value
<b>Date Available to Workers</b>	01-Mar-2015
<b>Currency Conversion Date</b>	31-Dec-2015
<b>Number of Periods</b>	2

4. Click **OK**.
5. In the **Display Name** column, add a display name for each period, such as **2015 Annual Statement** and **2016 Annual Statement**.
6. Click the button in the **Welcome Message** column to compose a welcome message that workers see as the first page in the statement.
7. Type **Dear** followed by a space.
8. Click **Insert Name**.
9. In the **First Name** row, click the **Insert Segment** button.
10. Click **Done**.
11. Enter a comma after the first name placeholder in the welcome message.
12. Use the rich text editor to complete the welcome message.
13. Click **Save and Close**.

## Configuring Optional Eligibility and Statement Summary Page

1. Select the Statement Options tab.
2. In the **Eligibility Profile** field, select **IC Annual Salary**.
3. Click **Configure Summary Page**.
4. In the Monetary Compensation section, select the Table tab and verify the table contents.
5. Select the Graphs tab.
6. Complete the fields, as shown in this table.

Field	Value for the First Graph	Value for the Second Graph
<b>Graph Title</b>	Your Total Compensation	How Your Compensation Adds Up
<b>Graph Type</b>	Bar	Bar - stacked
<b>Graph Items</b>	Company Contributions	Company Contributions

7. Click **Save**.
8. Click **OK**.
9. Select the Descriptive Text tab.
10. Enter any text that you want to appear in the summary page specifically related to monetary compensation.
11. Scroll down to the Summary Page Descriptive Text section and expand it.
12. Enter some text, such as: **The summary provides you an overview of your compensation package. Click each category name to view additional details.**

13. Click **Save and Close**.
14. Click **OK**.
15. Click **Finish** to validate the statement.

## Generating and Viewing Statements

Update global settings, run the process to generate the statements, check the process reports, and view workers' generated statements.

1. Generate statements.
2. Monitor the process.
3. View the statements.

### 1. Generate statements.

1. Click the **Configure Global Settings** task.
2. Complete the fields used for default stock estimates in the statement, as shown in this table.

Field	Value
<b>Default Stock Price</b>	35
<b>Currency</b>	US Dollar

3. Click the **Generate Statements** task to access the Process Details page.
4. Complete the fields, as shown in this table.

Field	Value
<b>Statement Definition Name</b>	2015 Annual Statement
<b>Statement Period</b>	2015 Annual Statement
<b>Legal Employer</b>	Infusion USA

5. Click **Submit**.
6. Click **OK**.

### 2. Monitor the process.

1. Click the **Monitor Processes** task.
2. Find your process in the table.
3. If the status is **Processing**, click **Refresh**.
4. When the status is **Completed**, click the button in the **Reports** column for your process ID.

5. Analyze the summary details.

### 3. View the statements.

You must have the Compensation Manager role to view statements.

1. Click the Details tab to see the workers for whom statements were generated.
2. Click the button in the **View Statement** column for a worker.
3. Verify the statement content and formatting.
4. Click **Processing Reports** in the task panel tab to return to the report Details tab.
5. View and verify additional statements as needed.
6. Click **Sign Out**.
7. Close the Browser.

#### *Related Topics*

- [Eligibility Profiles: Explained](#)



# 29 External Data

## External Data Lookups: Explained

You can categorize data from third-party or legacy applications based on a lookup. You can edit or add new values to the External Data lookup type during initial implementation and at any later time. For example, you create a lookup code for your 401K plan data. The following external data lookups are predefined:

- Data from a legacy application
- Data from a third-party supplier

Use the Manage Lookups task in the Compensation work area to add or edit the lookup codes for the CMP\_EXTERNAL\_DATA\_RECORD\_TYPE lookup type.

*Related Topics*

- [Lookups: Explained](#)

## Using External Data: Worked Example

This example demonstrates how to add a single row of external data and then use the data in workforce compensation and total compensation statements.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Do you want to use one of the delivered lookup codes or add a unique code?	Add a unique code
Do you want to import or manually add the external data?	Manually add
Do you want to use the data for workforce compensation or total compensation statements?	Both
What do your external data custom columns represent?	<ul style="list-style-type: none"><li>• Column 01 is Beginning Balance</li><li>• Column 02 is Ending Balance</li></ul>

## Task Summary

To import external compensation data, complete the following tasks. Use the default values except where otherwise indicated.

1. Add a lookup code.

2. Add external data.
3. Configure the worksheet columns.
4. Configure the compensation items.

## Prerequisites

1. Install the Oracle ADF Desktop Integration Add-in for Excel.
2. Configure a workforce compensation plan.
3. Create a total compensation statement.

## Adding a Lookup Code

1. In the Compensation work area Tasks panel tab under Common Configuration, click **Manage Lookups** to open the Manage Lookups page.
2. Search for the CMP\_EXTERNAL\_DATA\_RECORD\_TYPE lookup type.
3. In the CMP\_EXTERNAL\_DATA\_RECORD\_TYPE: Lookup Codes section, click **Add**.
4. Complete the fields as shown in this table.

Field	Value
<b>Lookup Code</b>	FID_401K
<b>Display Sequence</b>	1
<b>Start Date</b>	1/1/01
<b>End Date</b>	12/31/20
<b>Meaning</b>	Fidelity 401K
<b>Description</b>	Data from Fidelity 401K provider

5. Click **Save**.

## Adding External Data

1. In the Compensation work area Tasks panel tab under Common Configuration, click **Manage External Data** to open the Manage External Data page.
2. In the Search Results section, click **Add**.
3. In the **Person Name** field, select the person for whom you're adding the external data.
4. Complete the fields as shown in this table.

Field	Value
<b>Record Type</b>	Fidelity 401K

Field	Value
<b>Start Date</b>	1/1/14
<b>End Date</b>	12/31/14
<b>Sequence Number</b>	1
<b>Currency</b>	US Dollar
<b>Column 01</b>	100,000
<b>Column 02</b>	132,000

## Configuring the Worksheet Columns

1. In the Compensation work area Tasks panel tab under Workforce Compensation, click **Manage Plans** to open the Manage Workforce Compensation Plans page.
2. Click the configured workforce compensation plan to open the Define Workforce Compensation page.
3. For Configure Worksheet Display, click **Go to Task** to open the Configure Worksheet Display page.
4. For a compensation type tab, click **Configure** to open the Configure Worksheet Page Layout page.
5. Select the **Detail Table** tab.
6. Expand **Custom Columns**.
7. Enable **Custom Numeric Column 16**. Because the external data in this example is numeric, you select a numeric type column.
8. In the **Display Name** field, enter Beginning Balance.
9. Click the **Configure Column Properties** button to open the Configure Column Properties dialog box.
10. Select the **Default Values** tab.
11. Complete the fields as shown in this table.

Field	Value
<b>External Data Record Type</b>	Fidelity 401K
<b>External Data Column</b>	Column 01

12. Click **OK** to return to the Configure Worksheet Page Layout page.
13. Enable **Custom Numeric Column 17**.
14. In the **Display Name** field, enter Ending Balance.
15. Click the **Configure Column Properties** button to open the Configure Column Properties dialog box.
16. Select the **Default Values** tab.
17. Complete the fields as shown in this table.

Field	Value
<b>External Data Record Type</b>	Fidelity 401K

Field	Value
<b>External Data Column</b>	Column 02

18. Click **OK** to return to the Configure Worksheet Page Layout page.
19. Click **Save and Close** to return to the Configure Worksheet Display page.
20. Click **Save and Close** to return to the Define Workforce Compensation page.
21. Click **Done** to return to the Manage Workforce Compensation Plans page.

## Configuring the Compensation Items

Add the two compensation items. Repeat steps 2 and 3 to create the second compensation item.

1. In the Compensation work area Tasks panel tab under Total Compensation Statements, click **Manage Compensation Item** to open the Manage Compensation Items page.
2. In the Search Results section, click **Create** to open the Create Compensation Item dialog box.
3. Complete the fields as shown in this table.

Field	Item One Value	Item Two Value
<b>Item Name</b>	Beginning Balance	Ending Balance
Source Type	External Data	External Data
<b>Record Type</b>	Fidelity 401K	Fidelity 401K
<b>Column</b>	Column 01	Column 02
<b>Type of Compensation</b>	Monetary	Monetary
<b>Currency</b>	US Dollar	US Dollar

4. Click **Save and Close** to return to the Manage Compensation Items page. The first time, repeat steps 2 and 3 to create the second compensation item. The second time, click **Save and Close**.

### Related Topics

- [Importing Market Data in the Integrated Workbook: Procedure](#)
- [External Data Lookups: Explained](#)

# Importing External Data in the Integrated Workbook: Procedure

You can generate integrated Microsoft Excel workbooks to enter and edit external compensation data, such as third-party or legacy data. Then, upload the data into the application database.

The basic process for importing external data using the workbook is:

1. Generate the workbook.
2. Enter workbook data.
3. Upload external data.
4. Resolve errors.

Repeat these steps as many times as required to accommodate revisions. New uploads to existing data make date-effective changes to the data.

## Prerequisites

Before importing external data, you can optionally add a `CMP_EXTERNAL_DATA_RECORD_TYPE` lookup code using the Manage Lookups task. Before or after you import the external data you must do one or both of the following to use the data:

- Configure one or more custom worksheet columns, if you plan to use the external data for workforce compensation.
- Create one or more compensation items with the **External Data** source type, if you plan to show external data in total compensation statements.

## Generating the Workbook

In the Compensation work area:


1. In the Tasks panel tab under Common Configuration, click **Manage External Data** to open the Manage External Data page.
2. Click **Prepare Import Spreadsheet** to generate the workbook.

## Entering Workbook Data

Add enough rows to accommodate your provider's data. Copy the external compensation data supplied by the provider and paste them into cells with a white background. The workbook displays a symbol in the **Changed** field to mark the rows that you added. Don't reorder or remove columns in your import file. If you do, the upload fails.

## Uploading External Data

After you complete your edits, click **Upload** to load into the application those rows that are marked as Changed. The application doesn't upload edits in cells with a nonwhite background.

-  **Caution:** Don't select the **Upload and then immediately download** option when prompted during an upload. This action causes the committed data to immediately download back into the workbook obscuring any errors that occurred during the upload.

To validate the changes, on the Manage External Data page search for and select the start date and record type, or other search criteria.

## Resolving Errors

The upload process automatically updates the **Status** cell in each workbook row.

If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** cell.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

### *Related Topics*

- [Using External Compensation Data: Worked Example](#)
- [External Data Lookups: Explained](#)

## FAQs

### How can I add external data to use in workforce compensation and total compensation statements?

You can add external data from a third-party or legacy application on the Manage External Data page. Click **Prepare Import Spreadsheet** to use the Oracle ADF Desktop Integration Add-in for Microsoft Excel to import the data. Or, manually add the data in the Search Results section.

### How do I add external data for multiple assignments?

Enter a unique assignment ID for each row of data on the Manage External Data page of the Compensation work area.

# Glossary

## **action**

Tracks changes to certain Human Capital Management (HCM) records, for example, changes to employment and assignment records. You can create your own actions and associate them with the predefined action types. You can optionally associate action reasons with actions.

## **alternate approver**

Approver of a workforce compensation worksheet who is outside of the standard approval hierarchy.

## **annualization factor**

Multiplication factor used to convert base salary to an annualized amount

## **assignment**

A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker's or nonworker's role in a legal employer.

## **assignment statement**

A statement that formulas use to set a value for a local variable.

## **band**

A specified range of values. Example: An age band defines a range of ages, such as 25 to 30, used to determine a person's eligibility.

## **benefits object hierarchy**

A structure that enables efficient management of benefits that share similar attributes. The four object types used to structure benefits offerings are programs, plan types, plans, and options.

## **benefits offering**

Any of an organization's nonsalary components of employee benefits packages, such as health, savings, life insurance, recreation, goods, or services.

## **COLA**

Abbreviation for cost of living adjustment

## **compa-ratio**

Salary as a percentage of salary range midpoint. 100 denotes salary at midpoint.

## **consolidation group**

A grouping of payroll runs within the same period for the same payroll, for which you can run reporting, costing, and post-run processing. You can specify a default consolidation group for each payroll definition.

## **contribution column**

Table columns that display compensation items representing the worker's or company's contribution amounts in a total compensation statement or compensation category.

## **database item**

An item of information that has special programming attached, which formulas and HCM extracts use to locate and retrieve the data.

## **derived factor**

Calculated eligibility criterion that changes over time, such as age or length of service.

## **determinant**

A value that specifies the use of a reference data set in a particular business context.

## **element**

Component in the calculation of a person's pay. An element may represent a compensation or benefit type, such as salary, wages, stock purchase plans, pension contributions, and medical insurance.

## **element classification**

Provides various element controls, such as the processing order, balances feeds, costing, and taxation. Oracle predefines primary element classifications and some secondary classifications. You can create other secondary classifications.

## **element eligibility**

The association of an element to one or more components of a person's employment record. It establishes a person's eligibility for that element. Persons are eligible for the element if their assignment components match the components of the element eligibility.

## **element entry**

The record controlling an employee's receipt of an element, including the period of time for which the employee receives the element and its value.



### **eligibility profile**

A user-defined set of criteria used to determine whether a person qualifies for a benefits offering, variable rate or coverage, compensation plan, checklist task, or other object for which eligibility must be established.

### **eligible salary**

Pay used to calculate the percentage adjustment of a workforce compensation allocation. It might not equal base pay due to proration or adjustment.

### **enterprise**

An organization with one or more legal entities under common control.

### **fast formula**

A simple way to write formulas using English words and basic mathematical functions. Formulas are generic expressions of calculations or comparisons that repeat with different input values.

### **flexfield segment**

An extensible data field that represents an attribute and captures a value corresponding to a predefined, single extension column in the database. A segment appears globally or based on a context of other captured information.

### **grade**

A component of the employment model that defines the level of compensation for a worker.

### **grade rate**

Used to define pay values for grades in a legislative data group.

### **grade step progression**

The advancement of workers through a sequence of grades or steps within a progression grade ladder, according to progression rules.

### **HR**

Abbreviation for human resource.

### **individual compensation**

Compensation awarded to individual workers outside of the regular compensation cycle, such as a spot bonus or education reimbursement. Some compensation is worker allocated, such as a savings contribution percentage.

### **input value**

Field defined for an element that holds information about an element entry that's needed for calculation. For example, hours worked, an alternate payment rate, or the amount of a bonus or deduction.

## **job**

A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

## **LDG**

Abbreviation for legislative data group.

## **legislative data group**

A means of partitioning payroll and related data. At least one legislative data group is required for each country where the enterprise operates. Each legislative data group is associated with one or more payroll statutory units.

## **lookup code**

An option available within a lookup type, such as the lookup code BLUE within the lookup type COLORS.

## **lookup type**

The label for a static list that has lookup codes as its values.

## **offering**

A comprehensive grouping of business functions, such as Sales or Product Management, that is delivered as a unit to support one or more business processes.

## **payroll relationship**

Defines an association between a person and a payroll statutory unit based on payroll calculation and reporting requirements.

## **personal payment method**

Method of payment to a person for a particular payroll. When an administrator assigns a person to a new payroll, payments are made using the default organization payment method for the new payroll until a personal payment method exists.

## **position**

A specific occurrence of one job that is fixed within one department. It is also often restricted to one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

## **profile option**

User preferences and system configuration options that users can configure to control application behavior at different levels of an enterprise.

## **progression grade ladder**

A hierarchy used to group grades and define their sequence. It includes the associated rates and progression rules for each grade and step within the ladder.

### **progression rule**

A set of criteria used to determine whether a worker is eligible to advance to a specific grade or step within a progression grade ladder.

### **Query By Example**

The row of fields directly above table column headers, used for filtering the data in the table.

### **rank**

Worker's assigned rank indicating where the individual stands with respect to others in a manager's organization, where 1 is the highest performing, or most valuable, worker.

### **ranking percentile**

Value given to a worker that represents the percentile rank among total workers ranked in a manager's organization, where 100 is the highest ranked worker.

### **ranking score**

Calculated value between 0 and 100 using all rankings given to a worker by all managers subordinate to the worker's manager.

### **rating model**

A scale used to measure the performance and proficiency of workers.

### **reference data set**

Contains reference data that can be shared across a number of business units or other determinant types. A set supports common administration of that reference data.

### **retroactive process**

A process that recalculates the amount to pay a person in the current period to account for retrospective changes that occurred in previous payroll periods.

### **salary basis**

Characterizes worker's base pay. Identifies payroll details used to pay base earnings, period of time pay is quoted, factor used to annualize base pay, components used to itemize adjustments into different reasons, and grade rate used for salary validation.

### **salary component**

Change reasons that enable itemization of salary adjustments by entering amounts or percentages for one or more components, such as merit or cost of living adjustment.

### **set enabled**

A property that describes entities that an organization shares as reference data. For example, you can indicate a lookup, customer, location, or document attachment as set enabled.

**total compensation statement**

A statement that communicates compensation, rewards, and benefits to workers. The statement can include traditional compensation and compensation often overlooked by workers.

**user-defined criteria**

Custom factors used to determine eligibility for objects such as benefits offerings and rates.