

Oracle

Human Capital Management Cloud Using Workforce Compensation

Release 12

This guide also applies to on-premises
implementations

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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

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1 Overview

Managing Compensation: Overview

This overview introduces the main business activities for the Manage Compensation business process.

The following figure shows the business activities.

Role	Manage Base Pay	Manage Individual Compensation and Personal Contributions	Manage Compensation Budgets	Administer and Manage Workforce Compensation
Compensation Administrator				Maintain Plans, Initiate Cycle, Manage and Transfer Data
Compensation Manager	Manage Individual Base Pay Records	Manage Off-Cycle Compensation Awards for Individuals	Initiate Budgets and Automatically Publish to Line Managers	Manage Models, Override Manager Allocations, or Act as Proxy
Line Manager	Manage Individual Base Salary, View Salary History	Manage Individual Variable Compensation, View History	Determine Budget Amounts to Distribute or Allocate	Allocate Compensation, View History, Rate Performance
HR Specialist	Manage Individual Base Salary, View Salary History	Manage Individual Variable Compensation, View History		
Worker		Enroll and Manage Personal Contributions		

Manage Base Pay

Line managers and HR specialists can:

- View and change an individual worker's salary basis
- Adjust base pay
- View salary history

Compensation managers can perform the same tasks for oversights, overrides, or acting as a proxy.

Manage Individual Compensation

Line managers and HR specialists can:

- View, allocate, and adjust individual ad-hoc variable compensation awards or recurring payments
- View compensation history

Compensation managers can perform the same tasks for oversights, overrides, or acting as a proxy.

Manage Personal Contributions

Workers can manage their own enrollment and voluntary contributions in company-sponsored savings and charitable contribution plans.

Manage Compensation Budgets

Compensation managers ensure that manager allocations stay within defined budget amounts by initiating and publishing budgets to line managers.

Line managers then distribute budgets down the reporting hierarchy or allocate budget amounts at the worker level.

Manage Workforce Compensation

Line managers can:

- Allocate, manually or automatically, one or more types of compensation for groups of workers on a focal, anniversary, or periodic basis
- Approve allocations of lower level managers
- Promote and rate worker performance and view compensation history while awarding compensation

Administer Workforce Compensation

Compensation administrators can:

- Run processes to initiate a compensation cycle, refresh HR data, and transfer data to workers' HR records
- Maintain plan configuration for new and current plan cycles

Compensation managers can:

- Manage and override worker information and allocations
- Analyze the results of compensation cycles using administrative reports

To manage compensation in the Manage Compensation business process, start from the following work areas:

Role	Work Area
Compensation Administrator	Navigator - Setup and Maintenance
	Compensation
Compensation Manager	Compensation
	My Team - Workforce Compensation
Line Manager	My Dashboard - Manager Resources
	My Team - Workforce Compensation
	Directory - Person Gallery
HR Specialist	My Workforce - Person Management
	Directory - Person Gallery
Worker	About Me - My Portrait

Related Topics

- [Manage Base Pay: Overview](#)
- [Manage Individual Compensation: Overview](#)
- [Manage Compensation Budgets: Overview](#)
- [Administer Workforce Compensation: Overview](#)
- [Manage Workforce Compensation: Overview](#)

2 Using Integrated Workbooks

Editing Salaries in the Integrated Workbook: Procedure

You can generate the integrated Microsoft Excel workbook, populated with the salary information that matches your download parameters. Use the integrated workbook to edit the salary information. Then, upload your changes into the application database. The workbook enables you to edit salary by providing a salary change percentage or amount, but you can't change the salary basis.

The basic process for downloading salaries using the workbook is:

1. Generate and populate the workbook.
2. Edit workbook data.
3. Upload edits.
4. Resolve errors.

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

Generating and Populating the Workbook

In the Compensation work area:

1. In the tasks panel tab, click **Download Salaries**.
2. Select the download parameters, including salary start date, and currency.
3. Select the latest salary start date and local currency options, if you plan to upload your workbook edits.

The currency shown comes from the input value of the payroll element attached to the salary basis.

4. Click **Preview Download** to view the data that matches your download parameters.
5. Click **Prepare in Workbook** to generate the workbook and populate it with the data that matches your download parameters.

Editing Workbook Data

After the download completes, you can modify data in cells with a white background. The workbook displays a symbol in the **Changed** cell to mark the rows where you entered data in one of the white cells. If you enter a new base salary or new amount, you must also enter a new salary start date. Ensure that the new base salary and current base salary aren't the same. Otherwise, you'll receive update failed errors when you upload your changes.

The workbook contains five columns to hold data for up to five active salary components of a salary basis. When you have fewer than five active salary components for a salary basis, only the column cells for the active salary components contain values. The other column cells remain blank. If you have more than five active salary components, the download includes only the first five.

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 Salaries page, then search for and select a person whose salary you updated.

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.

Related Topics

- [What's the difference between export to Excel and desktop integration for Excel?](#)

Importing Market Data in the Integrated Workbook: Procedure

You can generate integrated Microsoft Excel workbooks to enter and edit market survey data and upload it into the application database. Before importing market data, you must create any missing compensation types and add the survey supplier name and contact information.

The basic process for importing market data using the workbooks is:

1. Create the import template.
2. Enter market data.
3. Upload market data.
4. Resolve errors.

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

Creating the Import Template

In the Compensation work area, use the seven market data workbooks to import market data. Create the initial market data survey objects in the following order using the Manage Supplier Surveys task:

1. On the Manage Survey Job Structures page, click **Create Import Template** and select one of the five templates. You can import the job functions, job families, career streams or bands, career levels, and other levels in any order.
2. On the Manage Survey Job List page, click **Create Import Template**.
3. On the Import Survey page, create the template to import your survey.

You can also use the import survey template to update an existing survey, including load new job structures and list and update existing ones.


Entering Market Data

Copy the relevant job structures, job list, or survey data from the reports provided by the supplier and paste them into the workbook. The workbook displays a symbol in the **Changed** field to mark the rows that you added.

You must enter only one supplier code, survey code, or combination of supplier and survey codes per import template. For multiple supplier or survey codes, you must create a separate import template for each code. Also, don't delete or reorder any of the columns in the template. If you do, the upload fails

Uploading Market 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:** Do not 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:

- Use the **Manage Supplier Structures** task to open the Manage Survey Job Structures or Manage Survey Job List page, to view the new or updated data.
- Use the **Import Survey** task to refresh the page so that the page shows the newly imported survey. Click the survey name to open the Imported Survey Data page.

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.

Managing Budget Sheets and Worksheets in the Integrated Workbook: Procedure

You can generate the integrated Microsoft Excel workbook in which you download information from the workforce compensation budget sheet and worksheet. Use the integrated workbooks to edit the downloaded budget and compensation amounts. Then, upload your changes into the application database.

The basic process for managing budget sheets and worksheet using the workbooks is:

1. Generate and populate the workbooks.
2. Edit workbook data.
3. Upload edits.
4. Resolve errors.

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

Generating and Populating the Workbooks

In the Workforce Compensation work area, on either the budget sheet or worksheet, click **Prepare in Workbook** to generate the workbook. The export populates the generated workbook with your entire organization, not just the workers that appear in the worksheet or the budget sheet. The workbook format and content is independent of any personalizations you did for the budget sheet or worksheet. For example, the downloaded workbook doesn't honor filters applied or columns that are:

- Frozen
- Hidden or shown
- Reordered or resized
- Sorted

Editing Workbook Data

After the download completes, you can modify data in cells with a white background. The workbook displays a symbol in the **Changed** cell to mark the rows where you modified or entered data in one of the white cells. You can only enter values in amount columns. You cannot enter or change a value in a percentage column. When you upload the workbook, the application recalculates the percentage of eligible salary column based on the compensation amount you entered in the workbook.

The workbook does not reevaluate dynamic calculations and fast formulas. If you enter or edit values in columns that another column uses to calculate a value, the calculated value does not automatically update. After you upload the workbook, the application recalculates dynamic calculations and fast formulas when the page refreshes. You must configure the dynamic calculations and fast formulas to reevaluate when data changes on the worksheet.

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, navigate away from the budget sheet or worksheet and then return. Or if your session expired, log back in.

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.

Related Topics

- [What's the difference between export to Excel and desktop integration for Excel?](#)

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](#)
- [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?](#)


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.

3 Manage Base Pay

Overview

View and adjust workers' base salary. Line managers can award compensation in a variety of business flows and work areas. Compensation managers and HR specialists can perform the same tasks for administrative, oversight, and troubleshooting purposes.

They can:

- View a worker's salary basis and change it, subject to security and other constraints.
- Adjust base pay by adjusting:
 - Amount
 - Percentage
 - Compa-ratio
 - Other salary factors
- View salary history, as well as graphical analysis of current and new salary.

To manage base pay, start from the following work areas:

Role	Work Area
Line Manager	My Dashboard - Manager Resources
	Directory - Person Gallery
	My Workforce - Person Management
Compensation Manager	Compensation
HR Specialist	My Workforce - Person Management
	Directory - Person Gallery

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
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

Related Topics

- [How Many Salary Bases to Create: Points to Consider](#)

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.

Object	Description
Payroll Definition	<p>Period Type specifies the number of payroll periods.</p> <p>For example, a period type of Monthly Lunar includes 13 payroll periods.</p>
Rate	<p>Rate definition can specify the following periodicities:</p> <ul style="list-style-type: none"> • Return periodicity of the rate • Periodicity of each rate contributor • Periodicity of the calculated sum of the rate contributors

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

Related Topics

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

Editing Salaries in the Integrated Workbook: Procedure

You can generate the integrated Microsoft Excel workbook, populated with the salary information that matches your download parameters. Use the integrated workbook to edit the salary information. Then, upload your changes into the application database. The workbook enables you to edit salary by providing a salary change percentage or amount, but you can't change the salary basis.

The basic process for downloading salaries using the workbook is:

1. Generate and populate the workbook.
2. Edit workbook data.
3. Upload edits.
4. Resolve errors.

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

Generating and Populating the Workbook

In the Compensation work area:

1. In the tasks panel tab, click **Download Salaries**.

2. Select the download parameters, including salary start date, and currency.
3. Select the latest salary start date and local currency options, if you plan to upload your workbook edits.
The currency shown comes from the input value of the payroll element attached to the salary basis.
4. Click **Preview Download** to view the data that matches your download parameters.
5. Click **Prepare in Workbook** to generate the workbook and populate it with the data that matches your download parameters.

Editing Workbook Data

After the download completes, you can modify data in cells with a white background. The workbook displays a symbol in the **Changed** cell to mark the rows where you entered data in one of the white cells. If you enter a new base salary or new amount, you must also enter a new salary start date. Ensure that the new base salary and current base salary aren't the same. Otherwise, you'll receive update failed errors when you upload your changes.

The workbook contains five columns to hold data for up to five active salary components of a salary basis. When you have fewer than five active salary components for a salary basis, only the column cells for the active salary components contain values. The other column cells remain blank. If you have more than five active salary components, the download includes only the first five.

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 Salaries page, then search for and select a person whose salary you updated.

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.

Related Topics

- [Using Desktop Integrated Excel Workbooks: Points to Consider](#)
- [What's the difference between export to Excel and desktop integration for Excel?](#)
- [Setting Up the Desktop Integration for Excel: Procedure](#)

FAQs

What's a salary basis?

The salary basis determines the period in which base pay is expressed, specifies whether salaries can be itemized with components, and identifies any associated grade rate for salary validation. A worker's salary basis generally remains constant, however it can change. For example:

- A worker changes from an individual contributor to a manager. The salary basis changes from hourly to annual.
- A union contract amendment mandates itemizing a worker's pay rate. The hourly salary basis that does not use components changes to an hourly salary basis that uses components.

How can I edit multiple salaries at one time?

Use the integrated workbook in the Compensation work area to view and edit salaries for multiple persons. Follow these steps:

1. Use the Export Salaries task to set your export parameters.
2. Click **Prepare in Workbook** in the **Edit Preview** section to generate the workbook.
3. Make your edits in the workbook.
4. Upload your changes into the application database.

4 Manage 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 Accept .
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.

5 Manage Individual Compensation

Overview

Award variable compensation to individual workers outside of the regular compensation cycle, such as a spot bonus, education reimbursement, or car allowance. Line managers can award compensation in a variety of business flows and work areas. Compensation managers and HR specialists can perform the same tasks for administrative, oversight, and troubleshooting purposes.

They can:

- Award ad hoc bonuses, allowances, and other compensation.
- Initiate and update recurring payments.
- View a worker's compensation history to help determine if an award is deserved and to view past award amounts.

To manage Individual compensation, start from the following work areas:

Role	Work Area
Line Manager	My Dashboard - Manager Resources
	Directory - Person Gallery
Compensation Manager	Compensation
HR Specialist	My Workforce - Person Management
	Directory - Person Gallery

Salary Growth Rate Calculations: Examples

The following examples show how the application calculates the average annual salary growth rate and the cumulative salary growth rate. The examples show calculations over three and five year periods. This information appears in compensation history and in salary analytics.

Scenario

The following table shows the salary change information for both examples.

Year	Starting Salary	Ending Salary	Annual Growth Rate	Three Year Period
2010	38,000	41,000	7.89	NA

Year	Starting Salary	Ending Salary	Annual Growth Rate	Three Year Period
2011	41,000	43,000	4.88	NA
2012	43,000	49,000	13.95	Included
2013	49,000	54,000	10.20	Included
2014	54,000	54,000	0.00	Included

Average Annual Growth Rate

Average annual growth rate is the statistical average of the total percentage increase from January to December of each full year. To calculate this average, the application sums the annual growth rate of all the years in the calculation period and divides by the number of years.

The following table shows the calculation using the scenario data.

Period	Average Annual Growth Rate	Calculation
Three year	8.05	$(13.95 + 10.20 + 0.00) / 3 = 8.05$
Five year	7.38	$(7.89 + 4.88 + 13.95 + 10.20 + 0.00) / 5 = 7.38$

Cumulative Growth Rate

Cumulative growth rate is the total percentage of salary change over the period. To calculate the cumulative rate, the application:

1. Determines the amount of the salary increase for the period by subtracting the period starting salary from the period ending salary
2. Calculates the cumulative rate by dividing the salary increase amount by the starting salary

The following table shows the calculation using the scenario data.

Period	Cumulative Growth Rate	Calculation
Three year	25.58	$(54,000 - 43,000) / 43,000 = 25.58$
Five year	42.10	$(54,000 - 38,000) / 38,000 = 42.10$

FAQs

What's the difference between Other Compensation and Prior Compensation sections?

The Other Compensation section on the Manage Compensation page includes all current individual compensation awards for a worker, including active recurring plans. Current awards are those whose effective end dates are greater than or equal to the current date.

The Prior Compensation section shows up to five years of previous compensation. Recurring awards appear as prior compensation when their end date is earlier than the current date. These plans are view-only.

Why does the history displayed on the Manage Compensation page differ from what I see in compensation history?

The Prior Compensation section on the Manage Compensation page shows the full individual compensation history for a worker for the past five years. Compensation history includes only individual compensation for the payroll elements that you add to the Manage Compensation History page.

6 Manage Personal Contributions

Overview

Manage your own enrollment and voluntary contributions in company-sponsored savings and charitable contribution plans.

To manage personal contributions, start from the My Portrait page. Select **Navigator - My Portrait**.

7 Manage Compensation Surveys

Importing Market Data in the Integrated Workbook: Procedure

You can generate integrated Microsoft Excel workbooks to enter and edit market survey data and upload it into the application database. Before importing market data, you must create any missing compensation types and add the survey supplier name and contact information.

The basic process for importing market data using the workbooks is:

1. Create the import template.
2. Enter market data.
3. Upload market data.
4. Resolve errors.

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

Creating the Import Template

In the Compensation work area, use the seven market data workbooks to import market data. Create the initial market data survey objects in the following order using the Manage Supplier Surveys task:

1. On the Manage Survey Job Structures page, click **Create Import Template** and select one of the five templates.
You can import the job functions, job families, career streams or bands, career levels, and other levels in any order.
2. On the Manage Survey Job List page, click **Create Import Template**.
3. On the Import Survey page, create the template to import your survey.

You can also use the import survey template to update an existing survey, including load new job structures and list and update existing ones.


Entering Market Data

Copy the relevant job structures, job list, or survey data from the reports provided by the supplier and paste them into the workbook. The workbook displays a symbol in the **Changed** field to mark the rows that you added.

You must enter only one supplier code, survey code, or combination of supplier and survey codes per import template. For multiple supplier or survey codes, you must create a separate import template for each code. Also, don't delete or reorder any of the columns in the template. If you do, the upload fails.

Uploading Market 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:** Do not 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:

- Use the **Manage Supplier Structures** task to open the Manage Survey Job Structures or Manage Survey Job List page, to view the new or updated data.
- Use the **Import Survey** task to refresh the page so that the page shows the newly imported survey. Click the survey name to open the Imported Survey Data page.

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.

8 Allocate Budgets

Overview

You can keep compensation awards in line with your company's financial goals and targets by ensuring that manager allocations stay within defined budget amounts.

Compensation managers can:

- Publish budgets to line managers to either:
 - Distribute budgets down the reporting hierarchy
 - Allocate budget amounts at the worker level
- Enable managers to award compensation within their allocated budget amounts by automatically publishing budget amounts

Line managers can:

- Manually calculate budget amounts
- automatically determine budget amounts using a model
- Determine budget amounts offline by downloading budget details to a spreadsheet

To manage compensation budgets, start from the following work areas:

Role	Work Area
Line Manager	My Team - Workforce Compensation
Compensation Manager	My Team - Workforce Compensation
	Compensation

Publishing Budgets: Points to Consider

You publish your budget directly to your managers if you use manager-level budgeting and have at least one lower-level manager. The managers continue to push the budget down the hierarchy or they allocate compensation to their managers or workers. To make changes after publishing, you must withdraw or republish the budget. Publish, withdraw, or republish your budget by one of two methods:


- All managers
- Selected managers

All Managers

All managers receive their own budgets to manage. If they have lower level managers, they publish the budget to their managers. If they don't have reporting managers, they allocate compensation directly to their workers.

Selected Managers

Only the managers you select receive a budget. The selected managers manage their own budgets.

 **Note:** You can combine both methods. For example, one manager you select receives a budget now. Later, you publish the remaining budget to the remaining managers.

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.

Budgeting Method	Budget Distributed
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.

Budget Pool Storage Method: Critical Choices

When you set up a compensation budget pool, you select a method to store the budget using the Create or Edit Budget Pool dialog box. The budget method affects the published budgets when you reassign workers or their eligibility changes. You can store your budget by one of two methods:

- Percentages
- Amounts

Percentages

When you store budgets as percentages, the published budgets change when a manager's total eligible salary changes, such as when you reassign workers or their eligibility changes. For example, you publish a budget to David as ten percent of total eligible salary. David publishes budget percentages for himself and his direct reports as follows:

Manager	Total Eligible Salary (USD)	Stored Budget Percentage	Calculated Budget Amount (USD)
David	100,000	10	10,000
Rosa	500,000	10	50,000
Lee	400,000	10	40,000
Total	1,000,000		100,000

You reassign one of Lee's workers with an eligible salary of 100,000 to Rosa. Now Lee's total eligible salary decreases and Rosa's increases, affecting their calculated budget amount as follows:

Manager	Total Eligible Salary (USD)	Stored Budget Percentage	Calculated Budget Amount (USD)
David	100,000	10	10,000
Rosa	600,000	10	60,000

Manager	Total Eligible Salary (USD)	Stored Budget Percentage	Calculated Budget Amount (USD)
Lee	300,000	10	30,000
Total	1,000,000		100,000

Amounts

When you store budgets as amounts, the published amounts stay with the manager when you reassign workers or their eligibility changes. For example, you publish a 100,000 budget to David, a higher-level manager. David publishes budgets for himself and his direct reports, Rosa and Lee, as follows:

Manager	Total Eligible Salary (USD)	Stored Budget Amount (USD)	Calculated Budget Percentage
David	100,000	10,000	10
Rosa	500,000	50,000	10
Lee	400,000	40,000	10
Total	1,000,000	100,000	

You reassign one of Lee's workers with an eligible salary of 100,000 to Rosa. Because the budget storage method for the budget pool is **Amount** the calculations are as shown in this table:

Manager	Total Eligible Salary (USD)	Stored Budget Amount (USD)	Calculated Budget Percentage
David	100,000	10,000	10
Rosa	600,000	50,000	8.3
Lee	300,000	40,000	13.3
Total	1,000,000	100,000	

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.

Allocation Methods: Critical Choices

The allocation method determines how a model calculates budget or compensation amounts and target amounts or ranges for a given worker population. It influences how you apply the model results. The allocation methods available depend upon how the plan is set up. The allocation method you select lets you model amounts by:

- Bringing workers up to a specific compa-ratio or quartile
- Supplying a numeric or text value to a custom column
- Supplying a target range or percentage
- Allocating by a specified amount or percentage
- Increasing by a specified amount or percentage

Bringing Workers Up to a Specific Compa-Ratio or Quartile

Increase all workers' budget or compensation amounts by specific criteria. For example:

- Bring all workers in the US whose compa-ratio is less than 80 to a compa-ratio of 100
- Bring all workers in the UK in the Operations department to the third quartile

Supplying a Numeric or Text Value to a Custom Column

Enter a numeric or text value in a specific custom column. For example:

- Rename custom numeric column 16 to Corporate Modifier and display:
 - 02 for all workers in the US with a target of 80 percent or higher

- 05 for all workers in Canada with target of 80 percent or higher
- Rename custom text column 1 to Sanity Check and display Verify Salary for all workers whose:
 - Performance rating is high
 - Compa-ratio is less than 80

Supplying a Target Range or Percentage

Define a target range using a flat amount or percentage. For example, define a target bonus range of 3,000 to 5,000 USD for workers in the US who have a job title of Analyst and a grade of 3.

Allocate By a Specified Amount or Percentage

Allocate compensation by a flat amount or percentage. For example, allocate bonuses as follows:

- US workers with an outstanding performance rating a Bonus of 5,000 USD
- UK workers with an average performance rating a Bonus of 2,500 GBP

Increase By a Specified Amount or Percentage

Increase already allocated amounts by a flat amount or percentage of eligible salary. For example, give all workers in France an additional one percent of eligible salary on top of the compensation already allocated to them. To decrease a budget, enter a negative number or percentage.

Selecting a Budget Funding Level: Points to Consider

When you use a model to distribute budgets to your managers, you must specify the level of management to which the budget amounts apply. You fund budgets by one of three methods.

Budget Funding

The following table shows the three funding levels and how they distribute budgets.

Funding Level	Distribution
Top Managers	Only top level managers who have no manager above them
Managers One Level Down	Managers one level away from the highest manager in the hierarchy
All Managers	All managers

Applying Model Results: Points to Consider

After you create a model and preview model results, you apply the results to the worksheet or budget sheet. You replace the existing amounts or supply a target amount or range by applying the model results in one of four ways:

- Apply as budget amounts
- Apply as compensation amounts on the worksheet
- Apply to target amounts
- Apply to target ranges

Apply as Budget Amounts or Compensation Amounts

Replace the existing worksheet or budget sheet amounts with the model budget or compensation amounts. You increase the existing amounts if you use one of the following allocation methods that you enable during setup:

- Increase amount by n percent
- Increase n amount per person
- Increase n percent of eligible salary

Apply as Target Amounts or Target Ranges

Supply a target amount or range for managers to use as a guideline when determining allocations for their workers. For example:

1. Create a model to determine budget target ranges based on length of service and performance rating for an annual bonus plan.
2. Enter different ranges for workers who meet different combinations of length of service and performance rating.
3. Apply the model as target ranges.

Creating Compensation Models: Worked Example

This example demonstrates how to create and preview a compensation model that allocates a percentage of eligible salary based on job title and performance rating, exclude one worker from the model, and apply the results to the budget sheet or worksheet.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
What allocation method will you use to calculate the results of the model?	Allocate a percentage of the eligible salary
What criteria will you use to select the worker population?	Job title and performance rating
How will you distribute allocations based on the criteria?	For managers, allocate 4% for those with a performance rating of 2 and 8% for those with a performance rating of 3

Decisions to Consider	In This Example
	For analysts, allocate 3% for those with a performance rating of 2 and 6% for those with a performance rating of 3
	No allocations for those with a performance rating of 1
Will you exclude any workers?	Exclude one worker who is on loan to another department
Who can access the model?	Limit model access to the model creator

Task Summary

To create the compensation model, complete the following tasks:

1. Create and preview a compensation model.
2. Apply the model to the worksheet or budget sheet.

Use the default values except where otherwise indicated.

Prerequisites

1. Enable performance ratings
2. Set up the following rating scales:
 - o Rating 1 equals Below Expectation
 - o Rating 2 equals Meets Expectations
 - o Rating 3 equals Exceeds Expectations

Creating and Previewing a Model

1. In the Workforce Compensation work area, select a plan or budget sheet. Or, click **Model Compensation**.
2. On the budget sheet or worksheet, select **Create Model** from the **Model** menu. On the Manage Compensation Models page click **Create**.
3. Enter a model name and select a plan and component, as available.
4. Click **Continue**.
5. Complete the fields as shown in this table.

Field	Value
Allocation Method	Allocate n percent of eligible salary
Model Access	Limit model access to model creator
Criteria 1	Job Title

Field	Value
Criteria 2	Performance Rating

6. Click **Build Model**.
7. Click the **Workers Included** button.
8. Deselect the first worker in the **Include** column.
9. Click **Done**.
10. In the **Percentage of Eligible Salary** column, complete the fields as shown in this table.

Selection Criteria	Percentage of Eligible Salary Value
Manager, Rating 1	0
Manager, Rating 2	4
Manager, Rating 3	8
Analyst, Rating 1	0
Analyst, Rating 2	3
Analyst, Rating 3	6

11. Click **Preview Model Results**.
12. View the model results.

Applying Model Results

1. Click **Apply Results**.
2. Select **Budget Amounts**.
3. View results on the budget sheet or worksheet. The **New Budget Distribution Amount** column displays the new values.

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.

9 Compensate Workforce

Overview

Managers allocate one or more types of compensation manually or automatically for a group of workers on a focal, anniversary, or periodic basis. Compensation administrators process and transfer approved data to workers' HR records.

Line managers perform the following tasks:


- Allocate compensation.
- Promote and rate worker performance while allocating compensation.
- Determine compensation amounts offline by downloading details to a spreadsheet.
- Use a model to automatically calculate and allocate compensation to workers based on selected criteria.
- Generate company-configured compensation change statements to notify workers of a compensation award, job change, or performance rating assignment.
- Analyze proposed changes for equity among peer groups and by manager, alignment with the market, and pay for performance strategies.
- Review and approve work of subordinate manager.

Compensation managers can also perform these tasks for oversight, to override, and to act as a proxy.

To manage workforce compensation, start from the following work areas:

Role	Work Area
Line Manager	My Team - Workforce Compensation
Compensation Manager	My Team - Workforce Compensation Compensation
Compensation Administrator	Compensation

Approving and Submitting Compensation Worksheets

 **Watch:** This tutorial shows you how to review your team's allocations, approve lower-level managers' worksheets, and submit your workforce compensation worksheet for approval.

Promoting Workers During Workforce Compensation Cycle

 **Watch:** This tutorial shows you how to promote workers during a workforce compensation cycle.

Generating Compensation Statements

 **Watch:** This tutorial shows the steps you can take to generate a workforce compensation statement.

Manager's Worksheet Statuses: Explained

As a manager progresses through a workforce compensation cycle, the manager's worksheet status changes. The following table shows the manager's worksheet status and the progress in the workforce compensation cycle.

Status	Progress
Budget Available	The manager received a budget.
Not Started	Manager hasn't saved any changes to his or her worksheet.
Work in Progress	Manager saved some changes to his or her worksheet.
Submitted	Manager submitted his or her worksheet for approval.
In Approvals	First-level manager approved the manager's worksheet.
Fully Approved	Highest-level manager or approver in the approval hierarchy approved the manager's worksheet.
Processed	The Transfer Data to HR process ran and posted all awards to HR and payroll.

Creating Worksheet Filters

 **Watch:** This tutorial shows you how to create advanced worksheet filters in the workforce compensation worksheet.

Using Advanced Filters: Worked Example

This example demonstrates how to create custom conditions to filter your worksheet. You want to create a filter to see workers who satisfy the following criteria:

- Performance rating is outstanding
- Compa-ratio less than 80

Task Summary

To create the custom condition to filter your worksheet, complete the following tasks:

1. Create a custom condition.
2. Apply it to filter workers on the worksheet.

Use the default values except where otherwise indicated.

Prerequisites

Your administrator must have:

1. Enabled and configured Compensation Performance Ratings using the Configure Performance Ratings task.
2. Enabled Advanced Filters using the Configure Filters task.
3. Enabled the following columns, if not already enabled, using the Configure Worksheet Display task:
 - Salary Range Compa Ratio - Current
 - Compensation Performance Rating - Current

Creating a Custom Filter

1. In the Workforce Compensation work area, select the plan.
2. On the worksheet task bar, click the **Edit Advanced Filters** button.
You might have the option to use **View More Filters** to access the Edit Advanced Filters page.
3. Click the **Add Row** button.
4. In the **Name** field, enter a unique filter name.
5. In the new row, click the **Edit** button.
6. Click **Build Condition**.
7. Complete the fields as shown in this table. Click **Next** after each selection, as required.

Field	Value
Column	Compensation Performance Rating - Current
Operation	Equals
Value	Outstanding
Operation	And
Column	Salary Range Compa-Ratio - Current
Operation	Is less than

Field	Value
Fixed Number	80

8. Click **Done** to finish the condition.
9. Click **Apply** to return to the Edit Advanced Filters page.
10. Click **Save and Close** to return to the worksheet.

Applying the Filter to a Worksheet

1. On the worksheet filters bar, select the filter that you created in the **Advanced** field.
2. Click the **Go** button.
3. View your filtered worksheet.

Reassigning or Delegating Workers: Points to Consider

During a workforce compensation cycle, you might want a manager other than a worker's primary worksheet manager to give suggestions or allocate compensation. There are two ways for other managers to give suggestions or allocate compensation for one or more workers:

- Reassignment
- Delegation

Both reassignment and delegation are for the plan cycle only. They don't affect the primary worksheet manager relationships configured for the plan.

Reassignment

Reassignment moves a worker to another manager's worksheet so the other manager can allocate compensation. When you reassign a worker to another manager:

- The worker disappears from the primary worksheet manager's worksheet.
- The other manager makes the allocations and submits the worksheet.

For example, Joe recently joined Meg's group. He worked for Maria for most of the year covered by the compensation cycle. Meg reassigns Joe to Maria, who then evaluates his performance and allocates compensation.

Delegation

Delegation grants another manager temporary access to a worker who does not report to the other manager or fall within the other manager's reporting hierarchy. A primary worksheet manager can also use delegation to create a separate worksheet to manage a distinct set of his own workers. When you delegate a worker to another manager:

- The worker remains on the primary worksheet manager's worksheet.
- The other manager does not have access to:
 - Approvals and communication tab types

- Download to spreadsheet
 - Worker reassignments and eligibility changes
 - Budgeting, modeling, reporting
- The other manager can suggest but can't submit allocations.
- The primary worksheet manager:
 - Sees the suggested allocations
 - Makes the final allocations
 - Submits the worksheet

For example:

- Serena works for Roger, but at a different location. Andy is the manager for the remote office and manages Serena's day-to-day activities. Roger delegates Serena to Andy so he can comment on her performance and suggest a bonus amount. Roger sees the suggested amount and makes the final allocation.
- Robert wants to isolate a unique group of his workers. He selects the workers and delegates them to himself.

Managing Budget Sheets and Worksheets in the Integrated Workbook: Procedure

You can generate the integrated Microsoft Excel workbook in which you download information from the workforce compensation budget sheet and worksheet. Use the integrated workbooks to edit the downloaded budget and compensation amounts. Then, upload your changes into the application database.

The basic process for managing budget sheets and worksheet using the workbooks is:

1. Generate and populate the workbooks.
2. Edit workbook data.
3. Upload edits.
4. Resolve errors.

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

Generating and Populating the Workbooks

In the Workforce Compensation work area, on either the budget sheet or worksheet, click **Prepare in Workbook** to generate the workbook. The export populates the generated workbook with your entire organization, not just the workers that appear in the worksheet or the budget sheet. The workbook format and content is independent of any personalizations you did for the budget sheet or worksheet. For example, the downloaded workbook doesn't honor filters applied or columns that are:

- Frozen
- Hidden or shown
- Reordered or resized
- Sorted

Editing Workbook Data

After the download completes, you can modify data in cells with a white background. The workbook displays a symbol in the **Changed** cell to mark the rows where you modified or entered data in one of the white cells. You can only enter values in amount columns. You cannot enter or change a value in a percentage column. When you upload the workbook, the application recalculates the percentage of eligible salary column based on the compensation amount you entered in the workbook.

The workbook does not reevaluate dynamic calculations and fast formulas. If you enter or edit values in columns that another column uses to calculate a value, the calculated value does not automatically update. After you upload the workbook, the application recalculates dynamic calculations and fast formulas when the page refreshes. You must configure the dynamic calculations and fast formulas to reevaluate when data changes on the worksheet.

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, navigate away from the budget sheet or worksheet and then return. Or if your session expired, log back in.

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.

Related Topics

- [Using Desktop Integrated Excel Workbooks: Points to Consider](#)
- [Setting Up the Desktop Integration for Excel: Procedure](#)
- [What's the difference between export to Excel and desktop integration for Excel?](#)

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

Related Topics

- [Ranking Score: How It's Calculated](#)

FAQs

Can I switch to any other manager?

You can switch to any user who is in your security profile. For line managers, this is commonly lower-level managers in your hierarchy.

How can I reassign workers to another manager's worksheet?

Follow these steps:

1. Use the **Assign Workers to Another Manager** option on the Actions menu or the right-click menu to transfer one or more workers for this cycle only.
2. Select the manager to whom you want to reassign the workers.
3. Specify how to reassign subordinates if the workers are managers.

For example, you reassign a worker to his previous manager's worksheet because the worker reported to that manager during the evaluation period.

What happens when I filter my worksheet by two or more teams?

The summary table information dynamically changes to show the values for the teams you select. When you further filter the worksheet, such as by job, the summary information changes to reflect the filtered data. It continues to display the budget information associated with the managers that you selected in the team filter. The budget information changes when you use worker-level budgeting but not manager-level budgeting. The other data, such as eligible salary and total allocations, change with the filters.

What happens if I switch the display currency?

Switching the display currency on the page has no effect on the processing. The application processes the salary adjustments and lump sum awards in the worker's local currency.

What's the difference between primary managed plans, secondary managed plans, and other plans for review?

Primary managed plans are plans for which you are responsible for managing and allocating compensation to your team. You submit primary managed plans for approval.

Secondary managed plans and other plans for review are plans for which you are not the primary worksheet manager but have at least one worker delegated to you. You can suggest and save allocations for the worker if you are given the ability to update the worksheet. You don't submit allocations for approval for workers delegated to you. If you don't have a secondary managed plan or other plan to review, those regions don't appear on the Compensation Plans page

Why do I have other plans to review?

Another manager has given you temporary access to one or more workers so you can suggest allocations. You can review the other plans in the workforce compensation work area.

What happens if I delegate a worker to another manager?

The other reviewer sees a plan that includes the delegated worker in the **Other Plans for Review** section of the Compensation Plans page. The other reviewer views the worksheet data and suggests allocations. The worker remains on your worksheet. You can accept or override the suggested allocations. When you submit your worksheet, you submit the allocation for the delegated worker.

Can I perform actions for the workers in my other plans to review?

Yes. You can suggest compensation amounts and save your suggested allocations. You can view other data available in the worksheet. The primary worksheet manager of the delegated worker sees the suggested allocations on his own worksheet.

What happens if I approve my lower manager's worksheet?

The lower manager's access level changes to **Approved** and the worksheet goes to the next level for approval. Lower managers can no longer make updates to their worksheets

10 Administer Workforce Compensation

Overview

Maintain the definitions of compensation plans and global models, maintain and update worker and plan information, run processes, and review administration reports.

Compensation administrators can:

- Update plan data.
- Maintain currency rates and access to plans from the watchlist.
- Run processes to:
 - Start a compensation cycle
 - Transfer data to the HR system
 - Back out, purge, and refresh compensation data

Compensation managers can:

- Create and manage models for use by line managers or by administrators to distribute compensation directly to workers.
- Manage worker data by changing assignment data effective for the current plan cycle only.
- Override line manager allocations, job changes, and performance ratings.
- Analyze plan results.

To administer workforce compensation, select **Compensation** on the home page.

Entering Daily Rates Manually: Worked Example

You are required to enter the daily rates for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for 5 days for your company InFusion America Inc.

In order to load rates using the Daily Rates Spreadsheet, you need to install Oracle ADF Desktop Integration client software. Oracle ADF Desktop Integration is an Excel add-in that enables desktop integration with Microsoft Excel workbooks. Users can download the installation files from **Navigator > Tools > Download Desktop Integrator Installer**.

Entering Daily Rates

1. **Navigator > Period Close.**
Use the **Period Close** work area to link to close processes and currency process.
2. Click the **Manage Currency Rates** link.
Use the **Currency Rates Manager** page to create, edit, and review currency rate types, daily rates, and historical rates.

3. Click the **Daily Rates** tab.
Use the **Daily Rates** tab to review and enter currency rates.
4. Click the **Create in Spreadsheet** button.
Use the **Create Daily Rates** spreadsheet to enter daily rates in a template that you can save and reuse.
5. Click in the **From Currency** field. Select the GBP - Pound Sterling list item.
6. Click in the **To Currency** field. Select the USD - US Dollar list item.
7. Click in the **Conversion Rate** field. Select the Spot list item.
8. Click in the **From Conversion** field. Enter a valid value: 10/1/2014.
9. Click in the **To Conversion Date** field. Enter a valid value: 10/5/2014.
10. Click in the **Conversion Rate** field. Enter a valid value: 1.6.
11. Click the **Submit** > **OK** twice.
12. Review the **Record Status** column to verify that all rows were loaded successfully.
13. Save template to use to enter daily rates frequently. You can save the spreadsheet to either a local drive or a shared network drive.
14. Optionally, edit the rates from the Daily Rates user interface or resubmit the spreadsheet.

Related Topics

- [Using Rate Types: Examples](#)
- [Using Desktop Integrated Excel Workbooks: Points to Consider](#)

Updating Currency Rates: Worked Example

You are required to change today's daily rates that were already entered. The rates you are changing are for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for your company InFusion America.

Currency conversion rates were entered by an automatic load to the Daily Rates table. They can also be entered through a spreadsheet.

Updating Currency Rates

1. Navigate to the Period Close work area.
Use the Period Close work area to link to close processes and currency process.
2. Click the Manage Currency Rates link.
Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.
3. Click the Daily Rates tab.
Use the Daily Rates tab to review and enter currency rates.
4. Click the From Currency list. Select the GBP - Pound Sterling list item.
5. Click the To Currency list. Select the USD - US Dollar list item.
6. Enter the dates for the daily rates that you are changing. Enter today's date.
7. Click the Rate Type list. Select the Spot list item.

8. Click the Search button.
9. Click in the Rate field. Enter the new rate of 1.7 in the Rate field.
10. Click in the Inverse Rate field. Enter the new inverse rate of 0.58822 in the Inverse Rate field.
11. Click the Save button.

Related Topics

- [Using Desktop Integrated Excel Workbooks: Points to Consider](#)

Entering Currency Conversion Rates: Procedure

Enter currency conversion rates manually on the Manage Active Plans page, Currency Conversion Rates tab in the Compensation work area if you don't populate the rates through the Manage Daily Rates task. The Transfer Data to HR process posts award amounts in each worker's local currency. Converted rates are for display only in the worksheet. The application doesn't use the rates in any further calculations. You can refresh conversion rates on the Manage Daily Rates page. Click **Refresh** and then **Refresh Summary Totals**.

Entering the Rate

To enter a new currency conversion rate that converts the corporate currency into a new currency:

1. Add a new row.
2. Search for and select the currency code, such as CAD.
3. Enter the conversion rate.
For example, enter 1.00695 where 1 USD equals 1.00695 CAD.
4. Save the rate.

Repeat these steps to add additional currencies. If you manually override rates after starting a compensation cycle or publishing budgets, run the refresh data process immediately to refresh summary data to use the current rates. Run the processes from the Run Batch Process page.

Reprocessing or Adding a Worker to a Plan After the Cycle Starts: Examples

You can reprocess an individual who was previously found eligible or ineligible and reevaluate eligibility for a plan. You can add to a plan a worker who was not originally found eligible. The following scenarios illustrate when you might want to reprocess or add a worker to a plan after the compensation cycle starts.

Worker Transfers Into an Organization

Maria transfers into your organization after the compensation cycle starts and might be eligible to receive compensation. The process evaluates her eligibility for the plan and cycle based on the plan and cycle you select. If the process finds Maria eligible for the compensation plan, it adds her to the appropriate manager's worksheet.

Worker's Data is Corrected in HR

Michael was ineligible for a compensation plan because of incorrect data in his employment record. HR corrects the data after the compensation cycle starts. When you reprocess Michael, the process reevaluates his eligibility based on the corrected data. If it finds Michael eligible, it adds him to the appropriate manager's worksheet.

Worker Leaves an Organization

Janice is eligible for compensation when a cycle starts. A week later, she leaves your organization and is no longer eligible for a compensation award. When you reprocess Janice, the process reevaluates her eligibility, finds her ineligible, and removes Janice from her manager's worksheet.

Contingent Worker Becomes a Regular Worker

Ravi, a contingent worker, is not eligible to receive compensation when a cycle starts, but manages workers who are eligible. At this time his processing status is **Limited**, which allows him only to allocate compensation and approve lower managers' worksheets. A few weeks later, Ravi becomes a regular worker and is now eligible to receive compensation. When you reprocess Ravi, the process reevaluates his eligibility and finds him eligible. Ravi's eligibility status changes to **Eligible** and the process adds him to the appropriate manager's worksheet.

FAQs

What's the difference between primary worksheet managers, secondary managers, and other reviewers?

Primary worksheet managers are the worksheet owners responsible for the final compensation allocated to eligible workers, commonly the supervisors of the workers who appear on the worksheets. Each manager in the primary hierarchy receives a worksheet to allocate compensation to his directs and indirect reports. Primary managers manage budgets and submit their worksheets for approval up the approval hierarchy.

Secondary worksheet managers can view compensation information for workers available to them, including workers at lower levels in the hierarchy. Secondary worksheet managers are not necessarily the workers' primary worksheet managers but can be. Depending on how the plan is configured, the secondary managers can update and propose compensation and save their worksheet. Or they can only view allocations proposed by the primary worksheet manager. They don't submit worksheets for approval. Primary worksheet managers consider secondary managers' proposed allocations and may include them when they submit their worksheets.

Other reviewers are people who are delegated one or more workers by primary worksheet managers. Other reviewers have access similar to secondary managers, but the review hierarchy is only one level.

Why would I add another reviewer to this worker?

The primary worksheet manager may not be familiar with the worker's performance because the worker receives daily direction from another person or works in a different location than the primary worksheet manager.

What's a Limited to Normal processing method?

This method gives full participation in a workforce compensation plan to a person who has limited participation. When a person isn't eligible for a plan but has at least one subordinate worker who is eligible, the person's eligibility is **Limited**. The person can manage budgets and allocate compensation but can't receive compensation within the plan.

If the person becomes eligible for the plan after a cycle starts, you can add the person using the **Limited to Normal** processing method. The process adds the person to a manager's worksheet and makes the person eligible to receive compensation.

11 Run Batch Processes

Refresh Data Process: Points to Consider

The **Refresh Data** process synchronizes workforce compensation data with HR data, updates the plan design, updates the currency conversion rates, and recalculates the summary data. Decisions you make when you run the refresh data process are:

- Refresh date
- Refresh options

Refresh Date

The refresh date determines the date used to refresh the data for the selected refresh options. Run the process as often as needed depending on your business needs. Refresh frequency examples:

- Refresh nightly to ensure that line managers see the most current data including terminated workers, transfers, and other employment changes.
- Refresh only after you make a change to the plan configuration.

The following table shows the refresh date options and the corresponding date used to refresh the data:

Refresh Date	Date Used
Actual Process Run Date	Date the process runs for all processing, including eligibility.
Plan Cycle Dates	Following two dates configured on the Plan Cycle dialog box: <ul style="list-style-type: none"> • Eligibility Determination Date for eligibility processing • HR Data Extraction Date for all other processing
Specific Date	Date you enter for all processing, including eligibility.

If you use HCM coexistence, consider refreshing data after you run the coexistence refresh process. Predefined alerts use the most appropriate date for the type of alert and are exempt from the **Refresh Data** processing. In addition, new salary ranges, new compa-ratio, and other metrics associated with a promotion to a new grade use the Promotion Effective Date.

Refresh Options

You can select one or more refresh options to process. Manual primary worksheet manager and worker eligibility changes revert to their original values unless you identify the changes you don't want overridden in the Administer Workers pages.

The following table shows the refresh options and what is processed:

Refresh Option	Processing Description
Refresh HR Data	<p>Refreshes the following:</p> <ul style="list-style-type: none"> • All person and HR-related data, except the primary worksheet manager • Dynamic columns that include the Refresh Data triggering event • Worksheet summary region totals
Refresh Base and Eligible Salary	<p>Refreshes the following:</p> <ul style="list-style-type: none"> • Base salary, salary basis, and salary range columns, and anything stored related to these fields, such as base salary frequency, adjusted salary, FTE salary, compa-ratio, and more • Local currency, if input currency was used • Default values for eligible salary • Dynamic columns that include the Refresh Data triggering event • Worksheet summary region totals
Refresh Primary Manager Hierarchy	<p>Refreshes the following:</p> <ul style="list-style-type: none"> • Primary worksheet manager and rebuilds the hierarchy • Worksheet summary section totals
Refresh Secondary Manager Hierarchy	<p>Refreshes the following:</p> <ul style="list-style-type: none"> • Secondary manager and rebuilds the hierarchy • Worksheet summary section totals
Refresh Other Reviewer Hierarchy	<p>Refreshes the following:</p> <ul style="list-style-type: none"> • Manager listed as other reviewer, unless a primary manager selects the reviewer manually on the worksheet • Worksheet summary section totals
Reevaluate Eligibility	<p>Reprocesses a worker's eligibility at the plan and the component levels. This may establish new eligibility if you track ineligible workers. If you don't track ineligible workers, you use the Start Workforce Compensation process to add workers into a started plan. Refreshes the following:</p> <ul style="list-style-type: none"> • Dynamic columns that include the Refresh Data triggering event • Worksheet summary section totals
Refresh Column Defaults	<p>Refreshes the column defaults by running the following refresh options:</p> <ul style="list-style-type: none"> • Refresh HR Data • Reevaluate Eligibility • Refresh Manager Hierarchy • Refresh Dynamic Columns • Refresh Summary Totals
Refresh Dynamic Columns	<p>Refreshes the following:</p> <ul style="list-style-type: none"> • Dynamic columns that include the Refresh Data triggering event • Worksheet summary section totals
Refresh Alerts	<p>Refreshes the custom alerts that include the Refresh Data triggering event.</p>

For the Refresh Column Defaults option the process does not override existing column values that are not from HR and don't have a column default or dynamic calculation defined. The process does include recalculating an eligible salary that is derived using a formula or determined using a dynamic calculation.

Related Topics

- [Promotion Effective Date in Workforce Compensation: Explained](#)
- [Ineligible Workers: Points to Consider](#)

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

Input	Data Type	Required	Description
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 =====*/
```

Workers Approved at Least N Managers Up Level: Explained

When you run the Transfer Data to HR process, you can limit processing to only those workers whose manager's worksheet is at a specific level of the approval process. You select a **Workers Approved at Least N Managers Up** level on the Other Details process page. This option enables you to process workers whose allocation is approved at the specified level, even if worksheets at higher levels of the hierarchy are still pending approval.

Worksheet Approval Status

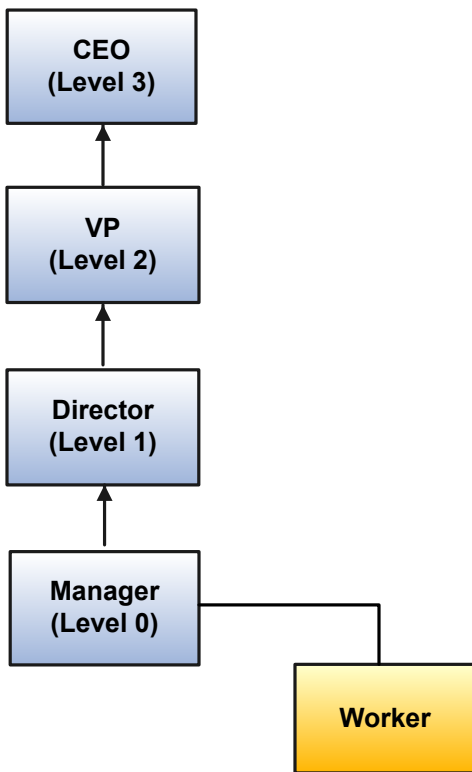
A primary worksheet manager submits his worksheet for approval. The manager's worksheet has a status of "In Approvals" when both of the following occur:

- The manager one level up approves the worksheet, either by explicit approval or submitting his own worksheet for approval.
- The worksheet is pending approval by any manager higher in the approval hierarchy.

Workers whose manager's worksheet has the status of "In Approvals" at the level you selected are not processed.

Examples

The following diagram shows a partial management hierarchy, with the worker's worksheet manager at level 0, the director, vice president (VP), and chief executive officer (CEO) at levels 1, 2, and 3 respectively in the approval chain.



You select a **Workers Approved at Least N Managers Up** level of "1". The worksheet has to be approved by the approver only one level above the worker's primary worksheet manager for the workers to be processed. In the diagram, the director must have approved the manager's worksheet. The manager's worksheet must be Approved or In Approvals for the worker to be processed.

You select a **Workers Approved at Least N Managers Up** level of "3". The worksheet must be approved by the approver three levels above the worker's primary worksheet manager for the workers to process. In the diagram, the CEO has to approve the VP's worksheet for the worker to be processed. The VP's worksheet must be Approved or In Approvals for the worker to be processed.

To process the Director and VP and the workers that report directly to them, their worksheets must be fully approved since there are not three levels above them

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.

FAQs

What happens if I post single entries as components?

The Transfer Data to HR process itemizes each worker's salary adjustment into salary components. For example, you allocate the salary adjustment for a worker as follows:

- Merit component = 5,000 USD
- Promotion component = 2,000 USD
- Adjustment component = 1,000 USD

When you post single entries as components, the Transfer Data to HR process posts an 8,000 USD base salary increase to the worker's salary record itemized into:

- Merit = 5,000 USD
- Promotion = 2,000 USD
- Adjustment = 1,000 USD

If you don't post single entries as components, the Transfer Data to HR process posts an 8,000 USD increase to the worker's salary record without any record of the component division.

How can I process stock during a cycle?

Follow these steps when you run the Transfer Data to HR process:

1. Enter stock grants at the **Stock Grant Details** step
2. Select the worker population by defining the worker inclusion criteria at the **Other Details** step

The process posts the information to the stock history table and it's available in compensation history. You don't have to set up payroll elements.

Why are the worker inclusion counts shown in the Statistics dialog box not what I expected?

The statistics include workers using the manager hierarchy and worker inclusion criteria. The statistics don't include workers using the person selection formula.

Why do I not see my plan in the list of values for the Start Compensation Cycle process?

Your user role does not have access to view the plan. Verify the following:

- The Configure Plan Access task for the plan doesn't restrict access for the compensation administrator role
- Your user has the compensation administrator role or the proper security to run the compensation batch processes

12 Maintenance Tasks in Workforce Compensation

Maintenance Tasks in Workforce Compensation: Overview

The rest of the chapters in this guide outline the tasks in the Compensation work area that you can use to add and maintain setup information.

Create and update configurations of compensation features, including:

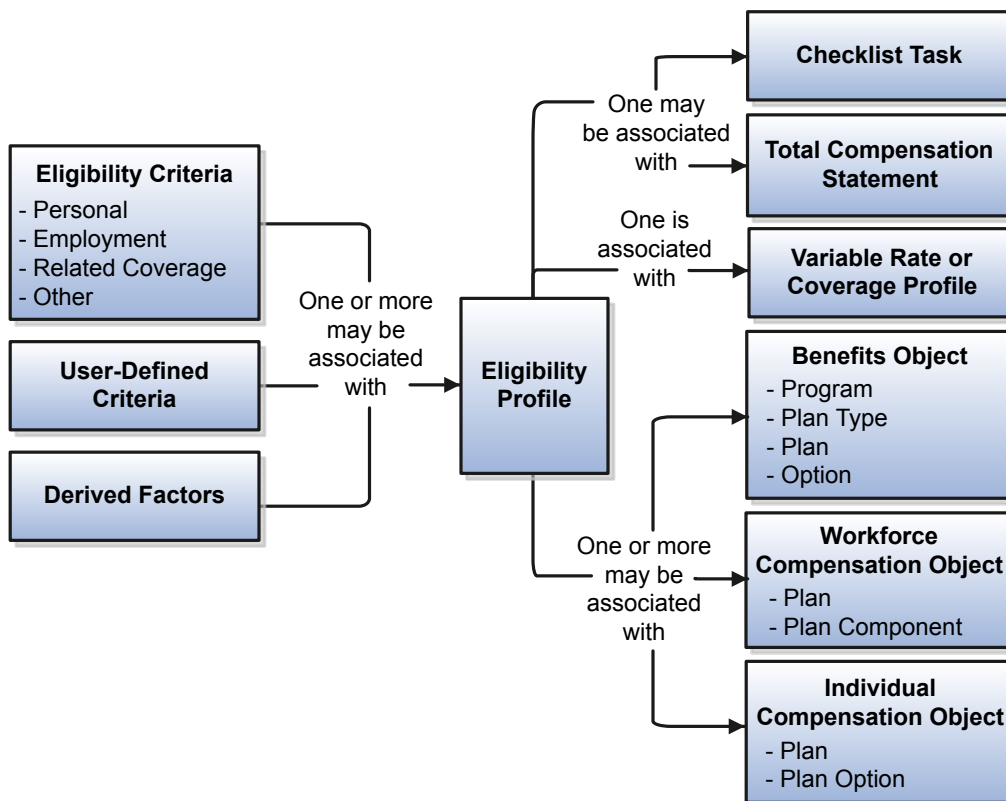
- Eligibility profiles
- Workforce compensation
 - Maintain Workforce Compensation plans, including worksheets, worksheet display, column properties, and models and reports.
 - Configure global settings that span all your Workforce Compensation plans.
- Total compensation statements
 - Update items, categories, and statement definitions annually or periodically.
 - Update the statement period and welcome message.

13 Manage 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	Select a determination rule to specify the day on which to evaluate the person's calculated age for eligibility. 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.
Full-time equivalent	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. 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.

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
Determination Rule	First of calendar year
Age to Use	Person's
Units	Year
Rounding	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
Period Start Date Rule	Date of hire This sets the beginning of the period being measured.
Determination Rule	End of year This sets the end of the period being measured.
Age to Use	Person's
Units	Year
Rounding	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
Determination Rule	First of year
Unit of Measure	US Dollar
Source	Stated compensation
Rounding	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
Profile Type	<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>
Usage	<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 Global makes the profile available to multiple business process usages.</p>
Assignment to Use	<p>Determines the assignment that the eligibility process evaluates for the person</p> <ul style="list-style-type: none"> Select Specific assignment when the usage is Compensation or Performance. Select a value that includes benefit relationship 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. Select one of the following values for all other usages, such as total compensation statements: <ul style="list-style-type: none"> Any assignment - enterprise Employee assignment only - enterprise Primary employee assignment only - enterprise

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

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](#)

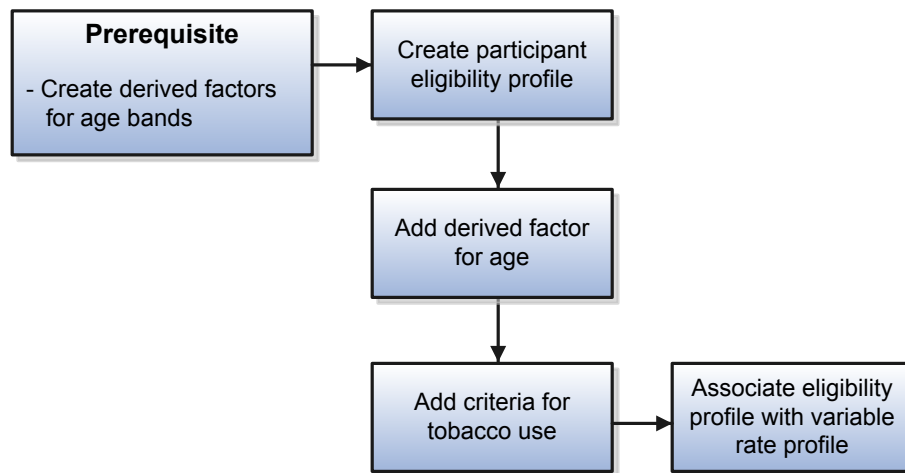
Creating a Participant Eligibility Profile: Worked Example

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
Name	Age Under 30+ Non-Smoking
Profile Usage	Benefits
Status	Active
Assignment to Use	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
Sequence	1
Age	Select the derived factor that you previously defined for ages under 30
Exclude	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
Sequence	1
Tobacco Use	None
Exclude	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
Profile Usage	Benefits
Profile Type	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
Profile Usage	Compensation, or Global
Profile Type	Participant
Assignment to Use	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
Profile Usage	Checklist
Profile Type	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.

14 Maintain 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.

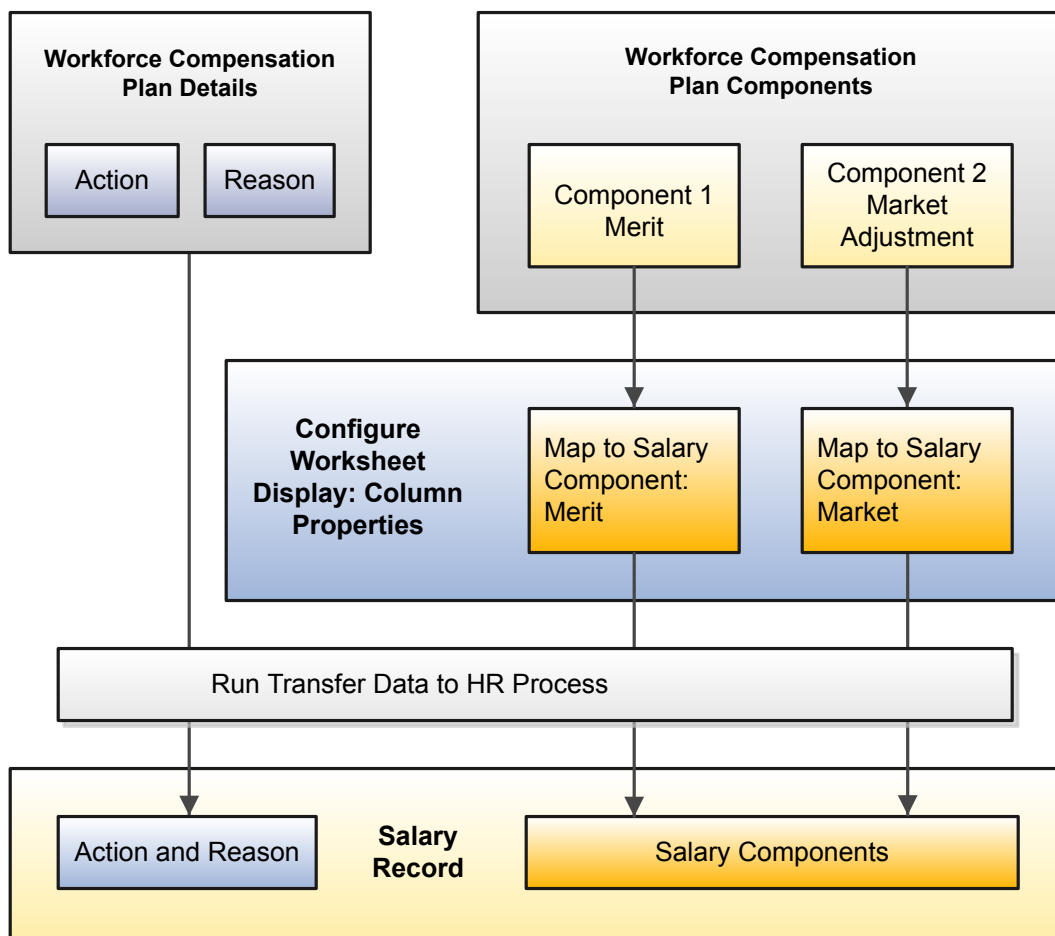
- If the manager on each assignment is different, the worker may appear on multiple managers' worksheets with different salaries for each.

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
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

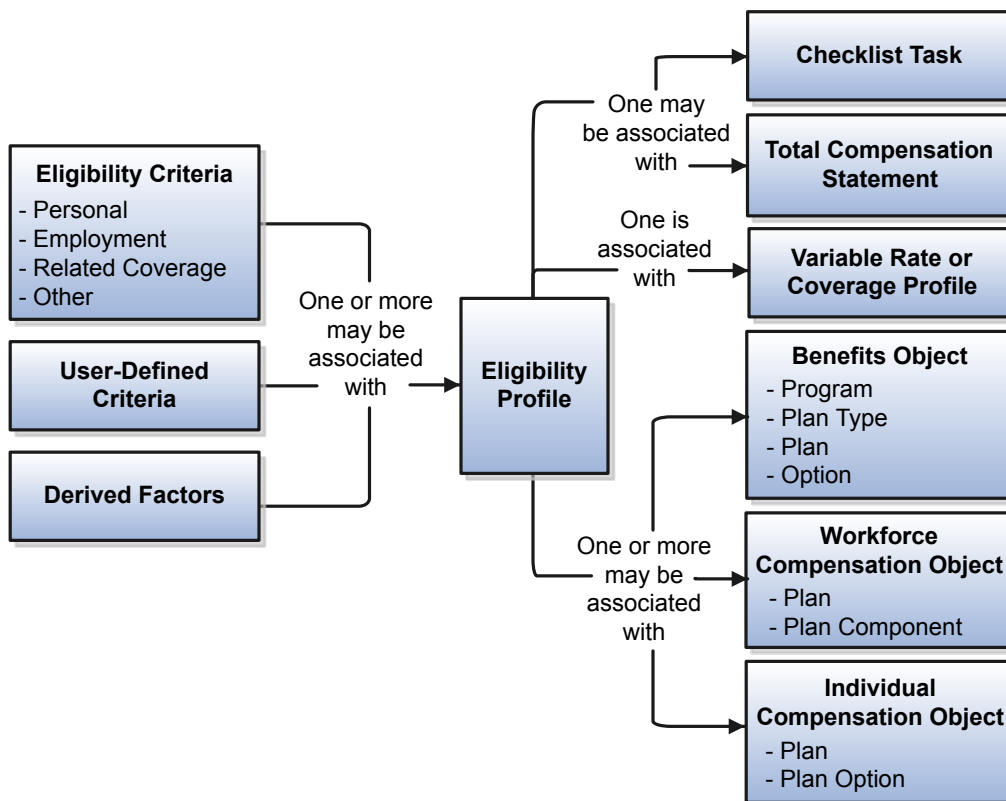
The plan is no longer available for use and isn't available to view or update. Compensation administrators can change the status back to Active from the Configure Plan Details page. Use this status to create and test plans, or for obsolete plans. You can purge only plans with this status from the system.

15 Configure 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.

16 Configure 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">a. A manager overrides the default promotion effective date.b. The Refresh Data process changes the worksheet column date back to the default promotion effective date set for the plan cycle.c. The process then uses the date to refresh the new salary metrics.
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">○ Default promotion effective date for the plan cycle○ Manager's overriding date

Related Topics

- Refresh Data Process: Points to Consider
- Configuring Column Properties: Explained

17 Configure 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"> • Accept or overwrite secondary manager or other reviewer proposals • Allocate compensation • Approve worksheets • Submit worksheets • Allocate budgets • Model compensation
Secondary	<p>Secondary managers can:</p> <ul style="list-style-type: none"> • View compensation information • See subordinate workers down the hierarchy • Propose allocations • Save allocations
Review	<p>Other reviewers can:</p> <ul style="list-style-type: none"> • View compensation information • Only see direct reports • Propose allocations • Save allocations

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
Primary Manager Hierarchy	The primary worksheet manager associated with the worker's assignment record determines the hierarchy.
Other Manager Hierarchy	Another manager type associated with the worker's assignment, such as project manager or resource manager, determines the hierarchy.
Formula	A custom hierarchy created using a fast formula determines the hierarchy.
Position Tree	The structure of the position tree determines the hierarchy.

Options	Description
Department Tree	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

- [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
CMP_IV_PLAN_ELIG_DATE	Date	Y	Plan Eligibility Date
CMP_IV_PERFORMANCE_EFFECT_DATE	Date	Y	Performance Effective Date

Input	Data Type	Required	Description
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 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

Input	Data Type	Required	Description
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_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
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](#)

18 Maintain 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:

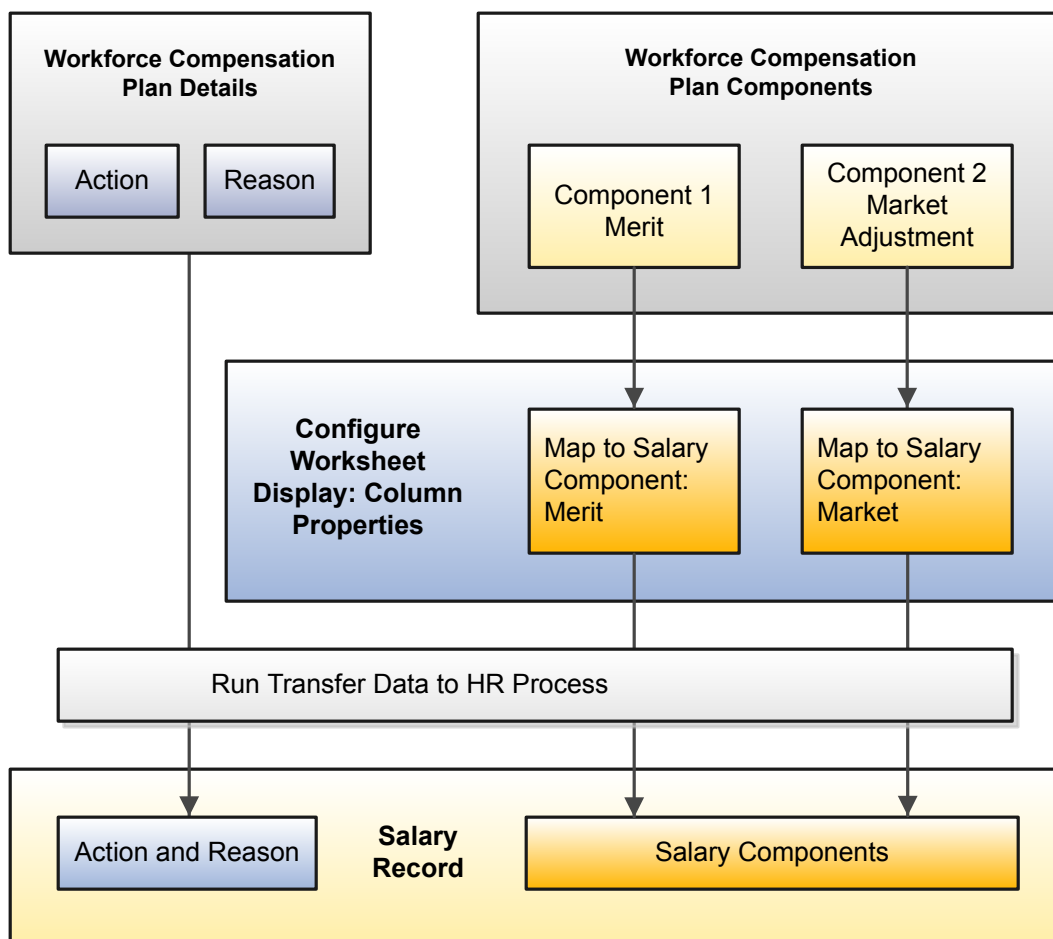
- If there is no budget, then there is no available budget.
- If the budget is zero, then no amount is budgeted. The available budget becomes negative when you make allocations.

19 Configure 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](#)

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.

20 Configure 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](#)

21 Configure 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
Approve anytime	Managers can approve their lower managers' worksheets at any time during the period the worksheet is available to them.
Manager must first submit	<p>Lower level managers must submit their worksheets upward for approval before a higher level manager can approve them.</p> <p>Ensures that higher managers don't approve worksheets before lower managers have had time to complete them.</p>
Disable approvals	Approvals are not required. Approve and Return for Correction 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
Submit anytime	Managers can submit their worksheets at any time during the period the worksheet is available to them.
All managers must be approved	Lower level managers must have their worksheets approved before a higher level manager can submit his own worksheet for approval. Ensures that higher managers review and approve allocations of lower managers before submitting allocations for their entire organization for approval.
Disable submit	Managers can only save their worksheets. The Submit 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

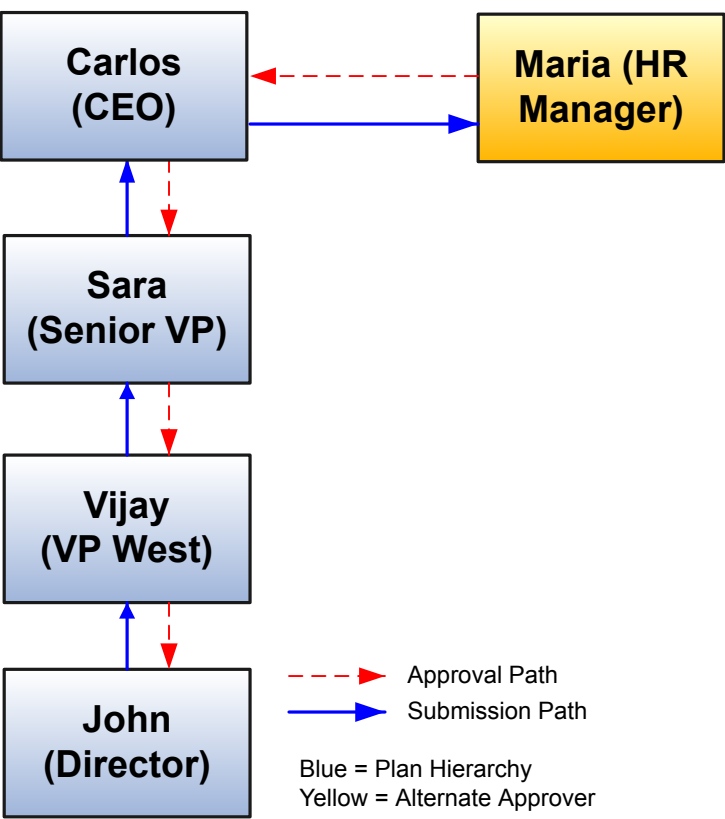
If you change an alternate approver hierarchy, you must refresh the manager hierarchy for those changes to take effect.

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:

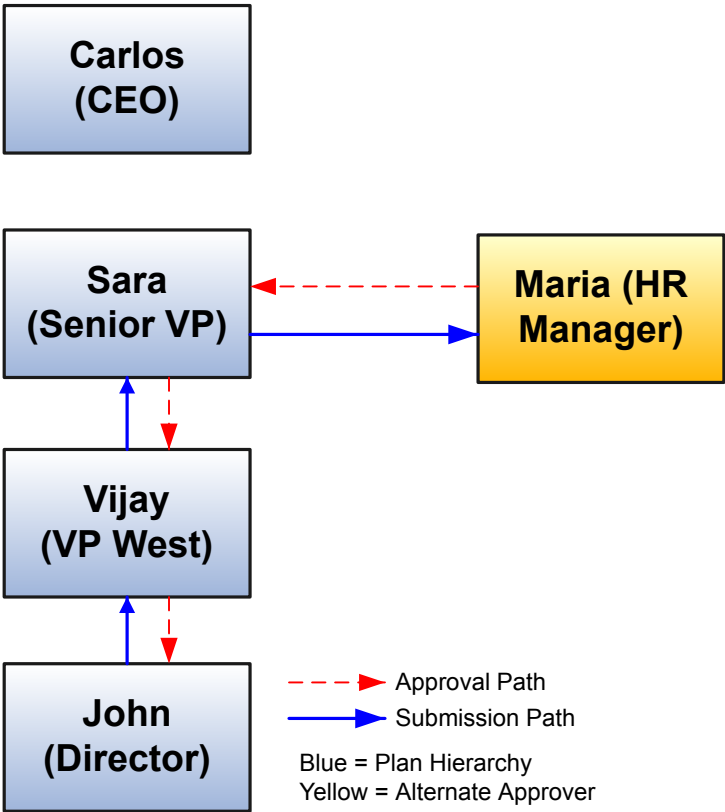
Primary Worksheet Manager	Approval Sequence	Alternate Approver
Sara	1	Maria

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

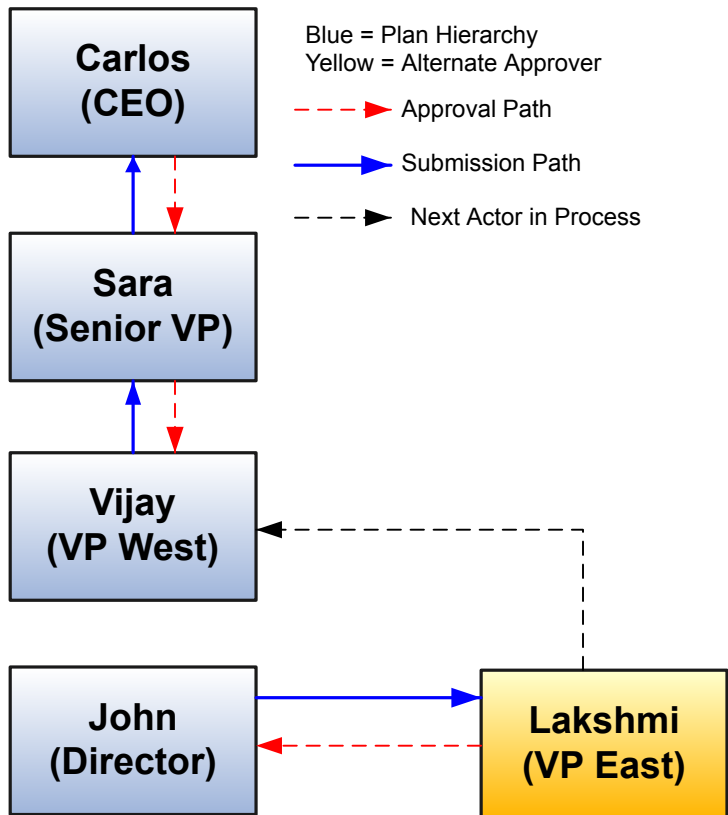
John reports to Vijay based on the plan hierarchy. However, John's entire team did a special project for Lakshmi during most of the past year. Sara wants Lakshmi to review and approve the compensation for John's team rather than Vijay. The following table shows how you build the alternate approver table:

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

22 Configure 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
Overall Budget	Budget -Filtered by Team
Overall Available Budget	Available Budget -Filtered by Team
Overall Compensation Amount	Compensation Amount - Filtered by Team

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.

Related Topics

- [Automatically Ranking Workers: Points to Consider](#)

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?	Start Compensation Cycle and Refresh Data
What conditions do you want evaluated?	Performance Rating of 5 (Outstanding) and 4 (Exceeds Expectations)
Which column on the worksheet do you want to dynamically calculate?	Compensation Amount 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
Column	Performance Rating
Operation	Contains
Fixed Value	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
Column	Annualized Full-Time Salary - Current
Operation	Multiplied by
Fixed Value	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
Column	Performance Rating
Operation	Contains
Fixed Value	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
Column	Annualized Full-Time Salary - Current
Operation	Multiplied by
Fixed Value	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.

23 Configure 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
Enable	Display the column on the worksheet.
Read-only	Make the column not editable on the worksheet.
Initially hidden	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 View 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.

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	Not Enabled
Condition	User has any of these roles

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	Read-only
Override Setting	Updatable
Condition	User has any of these roles

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	Enabled
Override Setting	Not enabled
Condition	User has none of these roles

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](#)

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">• Start Compensation Cycle process for the first time• Refresh Data process with the Refresh column defaults or Full refresh option selected	<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">• Refresh column defaults• Full refresh• Refresh dynamic columns <p>A manager tabs out of a column, if you select the Change worksheet data option</p>
Where Created	Manage Fast Formulas task	Manage Dynamic Columns page

Related Topics

- [Dynamic Calculations: Explained](#)
- [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 Region	Where Model Opened	Numeric Properties Source
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">Column 01 is Beginning BalanceColumn 02 is Ending Balance

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
Lookup Code	FID_401K
Display Sequence	1
Start Date	1/1/01
End Date	12/31/20
Meaning	Fidelity 401K
Description	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
Record Type	Fidelity 401K
Start Date	1/1/14
End Date	12/31/14
Sequence Number	1
Currency	US Dollar

Field	Value
Column 01	100,000
Column 02	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
External Data Record Type	Fidelity 401K
External Data Column	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
External Data Record Type	Fidelity 401K
External Data Column	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
Item Name	Beginning Balance	Ending Balance
Source Type	External Data	External Data
Record Type	Fidelity 401K	Fidelity 401K
Column	Column 01	Column 02
Type of Compensation	Monetary	Monetary
Currency	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.
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.

Formula	Description
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

Input	Data Type	Required	Description
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_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 =====*/
```

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.

24 Configure 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.

25 Configure 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
Name	Bonus exceeds maximum recommended amount
Type	Warning
Description	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
Column	Bonus Amount
Operation	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
Bonus Amount	5000
Bonus Target Amount	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	Original Amount Updated By - Component 1 column is not equal to Compensation Amount Last Updated By - Component 1 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	Compensation Amount column is greater than Compensation Target 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>New Base Salary column is greater than:</p> <p>Salary Range Maximum - Current column</p> <p>Or</p> <p>Salary Range Maximum - New column</p>
Description	Worker's new salary exceeds the worker's salary range maximum.

26 Configure 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.

27 **Validate and Process Plan**

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.

28 Configure 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 Not Started to Budget Available	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 Submitted	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 Return for Correction	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 In Approvals	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 In Approvals	Close	Manager's worksheet access is No Access
Final Approval Obtained	Manager's worksheet status changes to Fully Approved	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 No Access
Plan Access Changed	Higher level manager selects Change Access for All Managers or Change Access for Selected Managers from the worksheet	Manager who changed another manager's plan access	Manager whose plan access was changed	Close	None
Worksheet Withdrawn	Manager clicks Withdraw Submission	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 Withdraw All Budgets or Withdraw Selected Budgets	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 Change Due Date for All Managers 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 Save		originally supplied the amount.		
Request for Information	Manager selects one or more managers on the approval type tab, and clicks Request Information	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 Delegate Workers 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 Remove Delegations 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.

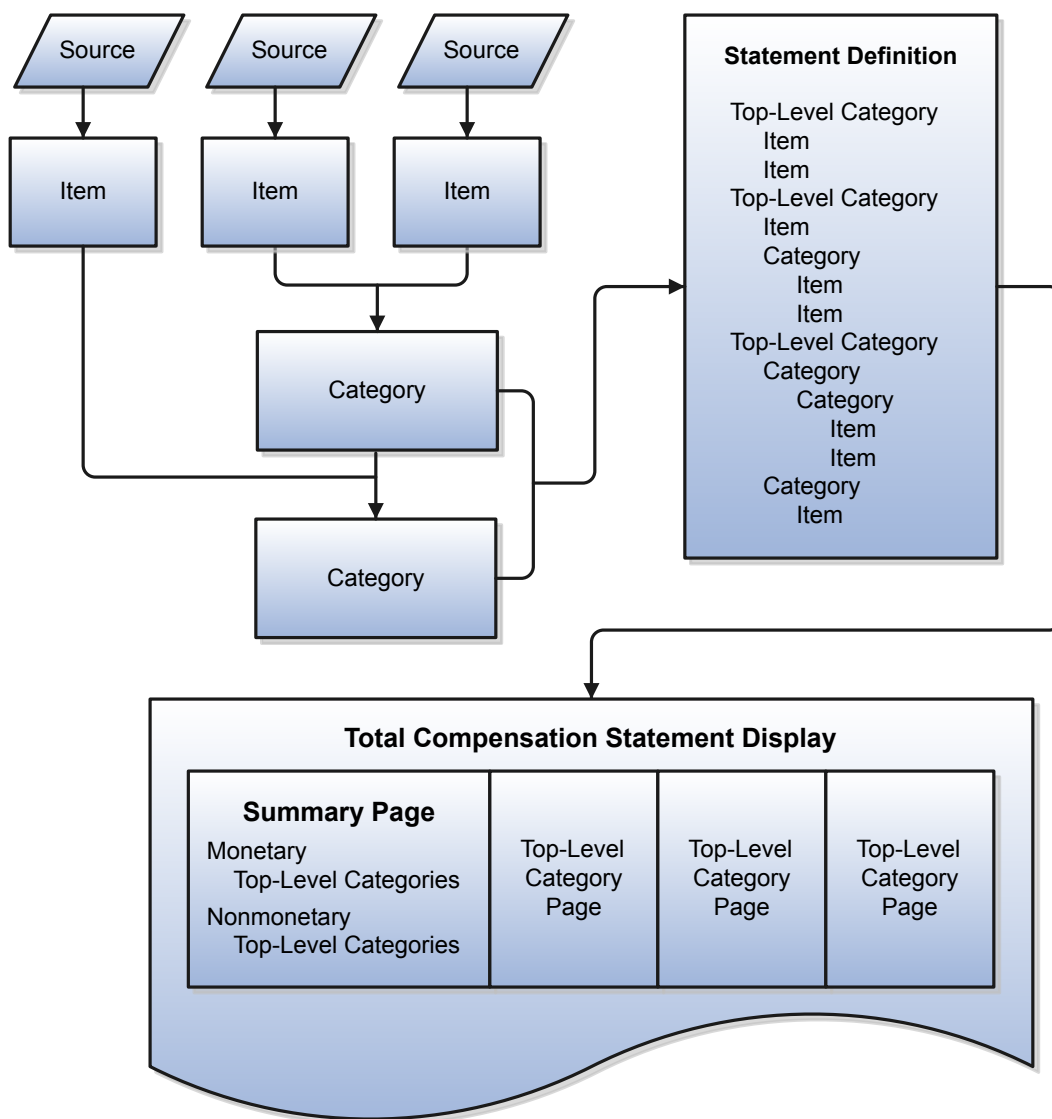
Related Topics

- [Defining Approvals for Human Capital Management: Explained](#)

29 Maintain 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	Do not display category if zero values or no values exist Display category if values are zero; hide if no value exists Always display the category page
Stock subcategory rows	Do not display row when no values exist or values are zeroes Display row if values are zeroes and allow subcategory drill Display and allow drill if historical values are over zero Always display the row and prevent drilling to subcategory Always display the row and allow drilling to subcategory
Items in categories	Do not display row when no values exist or values are zeroes Display row if values are zeroes; hide if no values exist Always display the row

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:

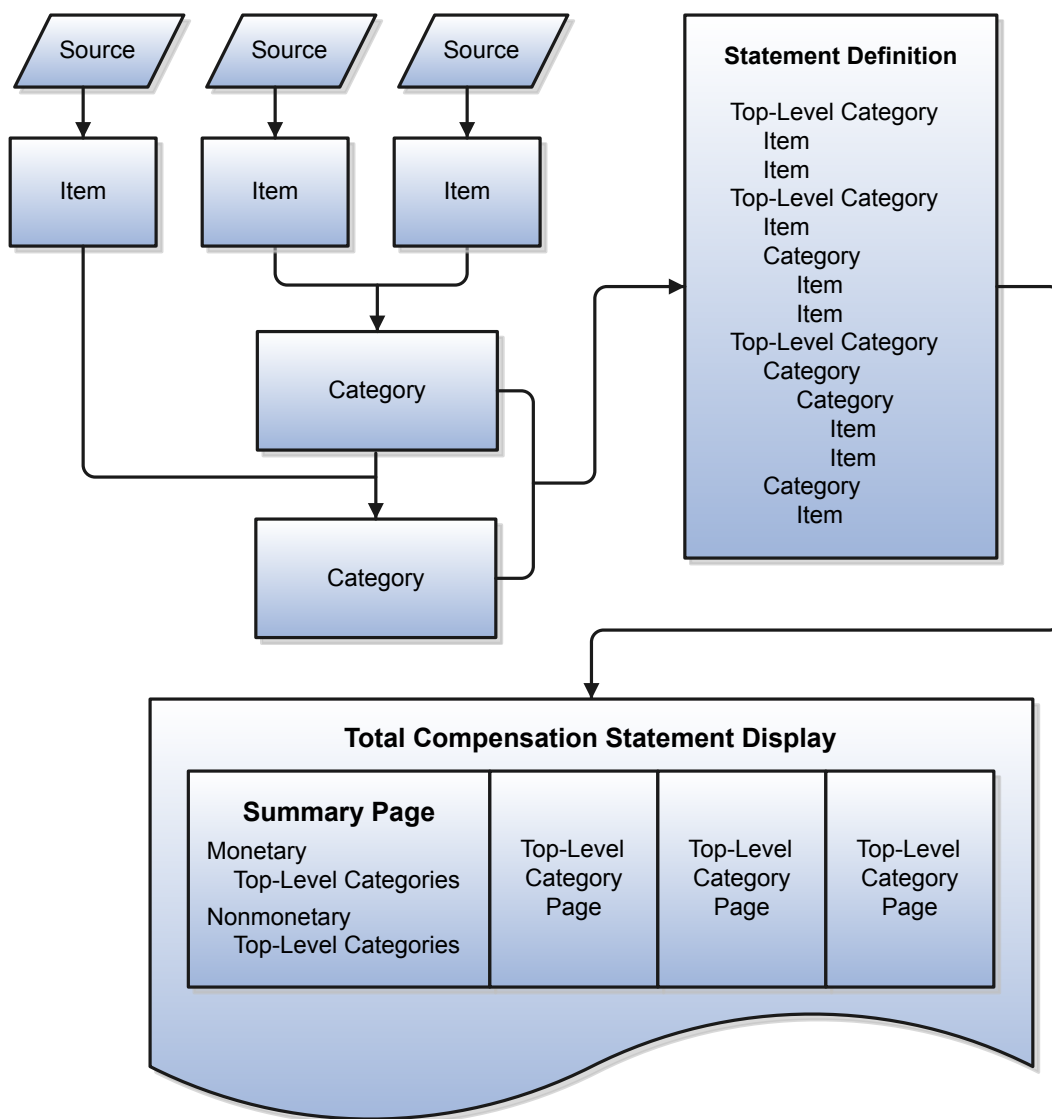
- Text or dates
- More than one nonmonetary unit of measure
- A combination of monetary and nonmonetary values

For example, a graph that mixes shares of stock, a company car, and fitness membership would not provide clear information.

30 Maintain 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.	Type of Compensation

Source Type	Description	Additional Data Entry Requirements
Element Entry	Compensation such as salary and bonus earnings retrieved from element entry.	Legislative Data Group, Payroll Element, and Input Value
External Data	Compensation such as data internal to the organization from another system, or data from a third party vendor.	Record Type, Column, and Type of Compensation.
Formula	Create a formula to retrieve compensation information that isn't stored in the other predefined source types.	Type of Compensation, nonmonetary Unit of Measure, Rounding Rule, and Currency. (Formula unit or currency overrides item definition)
Payroll Balance	Compensation such as commissions or company-paid taxes retrieved from payroll balance records.	Legislative Data Group

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"> Benefits Cash Compensation Savings Retirement 	<ul style="list-style-type: none"> Worker contributions Employer contributions Description 	<ul style="list-style-type: none"> Add compensation items Nest categories within the category as subcategories Hide columns that don't apply
Time Off	<ul style="list-style-type: none"> Type of time off Monetary value of the time off Accrued balance 	<ul style="list-style-type: none"> Edit column labels Configure category table row names as links to more information Can't nest categories as subcategories
Stock History	Up to 27 columns of data from the database table that stores workers' stock details	<ul style="list-style-type: none"> Select which types of stock to include in the category Alter which columns are hidden or only available optionally in statement view menu

Category Type	Default Columns	Configurable
		<ul style="list-style-type: none"> Edit column labels Can't nest categories as subcategories
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"> Configure column labels Select compensation items for the table rows Can't nest categories as subcategories

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.

31 Total Compensation Statements 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
Item Name	Profit Sharing Bonus
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Profit Sharing Bonus
Input Value	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
Name	Bonus
Category Type	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
Graph Title	Your Bonuses	How Your Bonuses Add Up
Graph Type	Bar	Bar - stacked
Graph Items	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
Item Name	Medical Worker Contribution
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Medical Worker Contribution
Input Value	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
Item Name	Medical Company Contribution
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Medical Company Contribution
Input Value	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
Name	Benefits
Category Type	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
Graph Title	Employee Versus Company Contributions	Total Contribution Comparison
Graph Type	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
Name	Commissions
Category Type	Custom
Number of Item Columns	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
Graph Title	Revenue Generated	Commissions Earned
Graph Type	Bar	Bar
Graph Items	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 |
|----------------------|---------------|
| Name | Stock History |
| Category Type | 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
Graph Title	Vested Versus Unvested Shares
Graph Type	Bar
Nonmonetary Graph Items	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
Item Name	Base Pay Exempts
Source Type	Element entry
Legislative Data Group	USA
Payroll Element	Base Pay Exempts
Input Value	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
Name	Cash Compensation
Category Type	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
Name	Salary
Description	Base pay amounts
Company Contribution	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
Name	Bonuses

Column	Value
Description	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
Graph Title	Your Cash Awards	Total Cash Compensation
Graph Type	Bar	Bar - stacked
Graph Items	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
Category Name	Stock Awards
Category Type	Other

- Click **Continue**.
- Select **Viewers drill into line items to see details** in the **Level of Detail** field.

2. Add and configure subcategories.

- Click **Add Subcategory**.
- Select the row for **ESPP Exempts**.
- Hold down the **Control** key and select the **Stock History Exempts** row.
- Click **Done**.

3. Configure display options.

- Edit the subcategory names as shown in this table:

Column	Stock History Category	ESPP Category
Name	Stock Options	Employee Stock Purchase Plan

- Click **Edit Column Properties** and select the **Company Contributions** column.
- Change the column label to **Stock Award**.
- Click **OK**.
- Select the Employee Stock Purchase Plan row.
- On the **Action** menu, select **Configure Zero or No Value Behavior of Row**.
- Complete the fields as shown in this table:

Field	Value
Zero Contributions Display	Always display the row
Alert Message	Enter any text to display when workers have no stock to display.

- Click **OK**.
- 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
Start Date	01-Jan-2015
End Date	31-Dec-2015

Field	Value
Date Available to Workers	01-Mar-2015
Currency Conversion Date	31-Dec-2015
Number of Periods	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
Graph Title	Your Total Compensation	How Your Compensation Adds Up
Graph Type	Bar	Bar - stacked
Graph Items	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
Default Stock Price	35
Currency	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
Statement Definition Name	2015 Annual Statement
Statement Period	2015 Annual Statement
Legal Employer	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](#)

32 Manage 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">• Column 01 is Beginning Balance• Column 02 is Ending Balance

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
Lookup Code	FID_401K
Display Sequence	1
Start Date	1/1/01
End Date	12/31/20
Meaning	Fidelity 401K
Description	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
Record Type	Fidelity 401K

Field	Value
Start Date	1/1/14
End Date	12/31/14
Sequence Number	1
Currency	US Dollar
Column 01	100,000
Column 02	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
External Data Record Type	Fidelity 401K
External Data Column	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
External Data Record Type	Fidelity 401K

Field	Value
External Data Column	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
Item Name	Beginning Balance	Ending Balance
Source Type	External Data	External Data
Record Type	Fidelity 401K	Fidelity 401K
Column	Column 01	Column 02
Type of Compensation	Monetary	Monetary
Currency	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](#)

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](#)

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

allocation method

User-selected way that a model automatically calculates workforce compensation budget amounts, compensation amounts, or targets.

alternate approver

Approver of a workforce compensation worksheet who is outside of the standard approval hierarchy.

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.

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.

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.

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.

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.

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.

quartile

Salary range divided into four equal parts. Quartile 1 is the lowest.

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.

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.

