



2024

Workforce Compensation Admin Guide



Camptra Technologies
1309 W 15th Street
Suite 240
Plano, TX 75075



info@camptratech.com

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Camptra Technologies

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Guide Usage and Disclosures

Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact our Training team at learn@camptratech.com.

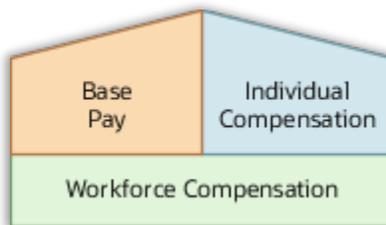
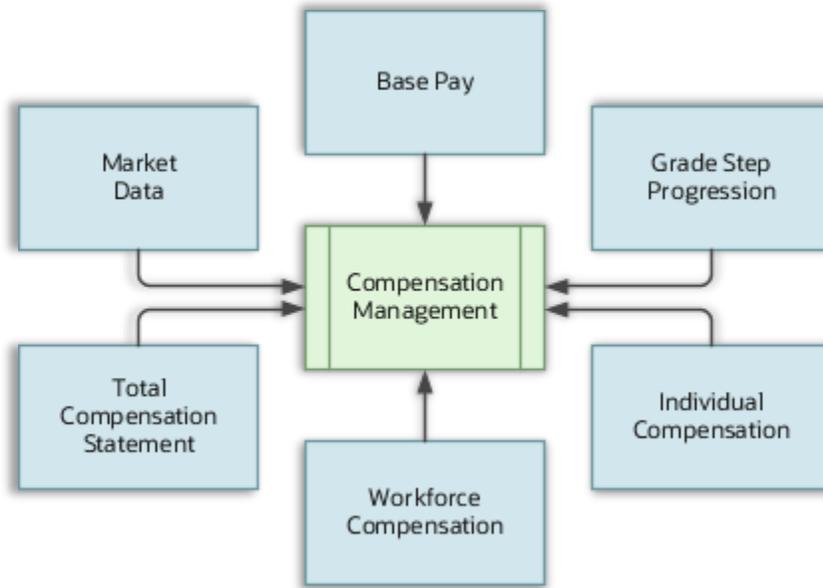
How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

- ✦ Any fields with an asterisk are required fields.
- ✦ Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
- ✦ You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

Overall Process Flow

Before we begin with the training content, It's important to understand the overall process flow of information in Oracle Cloud for the Workforce Compensation module.



Glossary of Terms

Here we've included common terms associated to the Workforce Compensation module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

Active Plan Status

- ❖ The plan is available for use, and we can start a plan cycle. Line managers can access the plan from the workforce compensation work area at any time during the period that worksheet is available to managers. Compensation managers can access the plan from the administration work area to view plan data even after the data is transferred to HR.

Alerts

- ❖ We can setup alerts to alert managers of conditions on the worksheet, such as allocations that exceed target amounts, or worksheet data that is not in sync with HR data. We can also create custom alerts based on conditions we define using worksheet columns.

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. Or, if the manager on each assignment is different, the worker may appear on multiple managers' worksheets.

Allocate Workforce Compensation

- ❖ The action for a Workforce Compensation Plan

Action and Action Reasons

- ❖ Action reasons further help to explain the reason for the action. For Allocate Workforce Compensation is: Anniversary, Career Progression, Cost of Living Adjustment, Market Adjustment, Mass Adjustment, Merit, Outstanding Performance, Performance, Periodic Review, and Promotion. We can extend this list to add additional actions and reasons.

Approval Mode

- ❖ Approval mode identifies when managers can approve their lower managers' worksheets. The first option, Approve anytime, allows managers to approve their lower managers' worksheets at any time during the period the worksheet is

available to them. The second option, Manager must first submit, means that lower level managers must submit their worksheets upward for approval before a higher level manager can approve them. This ensures that higher managers do not approve worksheets before lower managers have had time to complete them.

Approvals Management Structure

- ✦ A set of approval relationships and rules used by the Approvals Management Structure determines the hierarchy.

Budgeting

- ✦ With Budgeting, we can have separate budgets for each component or link multiple components to a single budget. We can also link budgets to off-cycle compensation plans. For example, we can give a manager a single annual budget amount and draw both focal and off-cycle awards from the same budget pool. Once we enable budgeting, we can configure how data displays on the budget page, such as data display order, available menu actions, and text instructions to the managers. Also, we can copy a budget page layout from another plan.

Compensation Actions & Reasons

- ✦ When you set up a workforce compensation plan, we must select an action and optional action reason that are associated with all salary and assignment records when we transfer data to HR after the cycle is complete. Managers can also select action reasons for individual workers when they allocate compensation or promote.
- ✦ For example, you might have a plan where managers allocate merit increases only. The action for the plan could be Allocate Workforce Compensation. The action reason could be Merit. When the batch process updates salary records after the compensation cycle is over, the Allocate Workforce Compensation action and Merit action reason appears in the worker's compensation history for that salary record.

Compensation Objects

- ✦ Any of an organization's workforce compensation plans and components or individual compensation plans and options for allocating salary, bonus, stock options, etc.

Compensation Change Statements

- ✦ We can create templates that managers use to generate compensation change statements for workers. We specify when statements can be generated and in what file format. We can enable statement groups to make different sets of

statements available for different plans or plan periods. For example, we might create three templates containing the same message but in three different languages. We can also create a template group, add the three templates, and add the statement group to a plan.

Compensation Hierarchy

- ✦ The Compensation Hierarchy Determination is a formula that determines the hierarchy for an associated workforce compensation plan.

Components

- ✦ Plans must have at least one component, but we can configure up to 5 components to represent the different types of compensation we wish to award within a plan. For example, salary components, merit, bonus, stock, cost of living, etc. We can determine how each component is processed when configuring the column properties for the compensation amount columns. Workforce compensation components that capture salary adjustments are posted as salary. We can associate each workforce compensation component with specific salary components if more than one will post as salary.

Custom Column Lookups

- ✦ By configuring custom lookup types, we can create custom columns that allow managers to select from a list of values. For example, we might create a custom column called “Promotion” and allow managers to select Yes or No by adding those values to one of the custom lookup types and this will be displayed on the planning worksheets

Eligibility Profiles

- ✦ When we add eligibility criterion to a profile, we can define how to use it to determine eligibility. For example, when we add an assignment status as a criterion, we must specify the assignment status and whether to include or exclude persons who match that value.

Eligibility Criteria

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

Employment Records

- ❖ The type of employment records selected for a plan determines the employment records evaluated by the start compensation cycle process and which records are used during the compensation cycle. We can determine the record to use by selecting one of the four criteria options: Primary Assignments, All Assignments, Employment Terms, Any Assignment or Employment Term with a salary

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 worksheet of the manager of the primary assignment. Workers whose legal employer uses a two-tier employment model are not evaluated.

Formula

- ❖ We can use a fast formula to create a custom hierarchy to determine the hierarchy.

Hierarchy Types

- ❖ The hierarchy determines how approvals are routed to the highest-level approver. The same hierarchy also determines how budgets are filtered through the organization when using manager level budgeting, or how budgets filtered up through the organization when using worker level budgeting. It also determines the workers that appear on each manager's worksheet. The hierarchy options we can use is: Approvals Management Structure, Manager Hierarchy, and Formula

Inactive Plan Status

- ❖ The plan is no longer available for use and is not 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. Only plans with this status can be purged from the system.

Manager Hierarchy

- ❖ The supervisor associated with the worker's employment record determines the hierarchy

Models

- ❖ Modeling enables managers to automatically allocate compensation to workers who meet certain criteria. We can enable modeling for managers and administrators, restrict modeling only to administrators, or disable it altogether. If modeling is enabled for managers, we can decide if they can create their own

models or use only those created by compensation professionals. We decide how to apply the model results to the worksheet. We can decide how to apply model results. The model can be applied as budget amounts, as target amounts or ranges, or as compensation amounts.

Nonmonetary Unit Of Measure Lookups

- ❖ Any of an organization's workforce compensation plans and components will contain nonmonetary units of measure, such as days, hours, items, shares, or units

Performance Ratings

- ❖ If we use performance ratings to allocate compensation, we can display the latest ratings to the managers during the cycle. We can also allow managers to enter these ratings during the compensation cycle. We can also make performance ratings and documents completed in Oracle Performance Management available to managers in the worksheet. We can display performance ratings, rate workers within compensation, or use both performance management ratings and compensation ratings.

Plan Foundation

- ❖ Includes plan currency, Workforce Compensation support multiple currencies. Plan access, and Feedback Survey.

Plan Status

- ❖ Plan status identifies the state of the plan and any plan cycles already started or completed. The two plan statuses are: Active and Inactive

Primary Assignments

- ❖ The start compensation cycle process includes and evaluates eligibility for primary assignments only. Even if a worker has multiple assignments, the worker only appears on the worksheet of the manager for the primary assignment. This is true if the plan uses a manager hierarchy.

Reason Lookups

- ❖ Adjustments and changes occur in the audit history. We can create reason lookups that will represent the change or adjustment reasons

Reports

- ❖ We can enable a set of analytics for managers to use when allocating compensation. Reports are not configurable.

Report Dimensions

- ❖ Reports use dimensions to group data. Models use dimensions as the criteria to build a model. If we enable reports or modeling, we can select the dimensions and range increments to use. We can create custom dimensions by configuring the custom columns available to models and reports.

Salary Components

- ❖ The salary basis attached to a worker's employment record determines if the worker's salary uses salary components. Salary components enable managers to itemize salary adjustments made into different reasons. For example, a manager might determine a worker's salary adjustment in this way.

Submit Mode

- ❖ Submit mode identifies when managers can submit their worksheets. The first option, Submit anytime, allows managers to submit their worksheets at any time during the period the worksheet is available to them. The second option, All managers must be approved, means that all lower level managers' worksheets must be approved before a higher level manager can submit his own worksheet for approval. This ensures that higher managers review and approve allocations of lower managers before submitting allocations for their entire organization for approval.

Workforce Compensation

- ❖ Create compensation plans and cycles used for compensating groups of workers on a focal or anniversary basis. Configure the type of compensation allocated, the information displayed to managers, whether budgeting is used, eligibility criteria for the plan or component, and the approval hierarchy. Additionally, we can manage payroll elements, formulas, derived eligibility factors, and HR actions used in plan setup and administration.

Workforce Compensation Setup Components

- ❖ Plan foundation, Budgeting, Worksheet, Models and Reports

Worksheet

- ❖ Worksheet configuration options are: Components, Performance Ratings, Compensation Change Statements, Alerts, and Worksheet Display

Worksheet Display

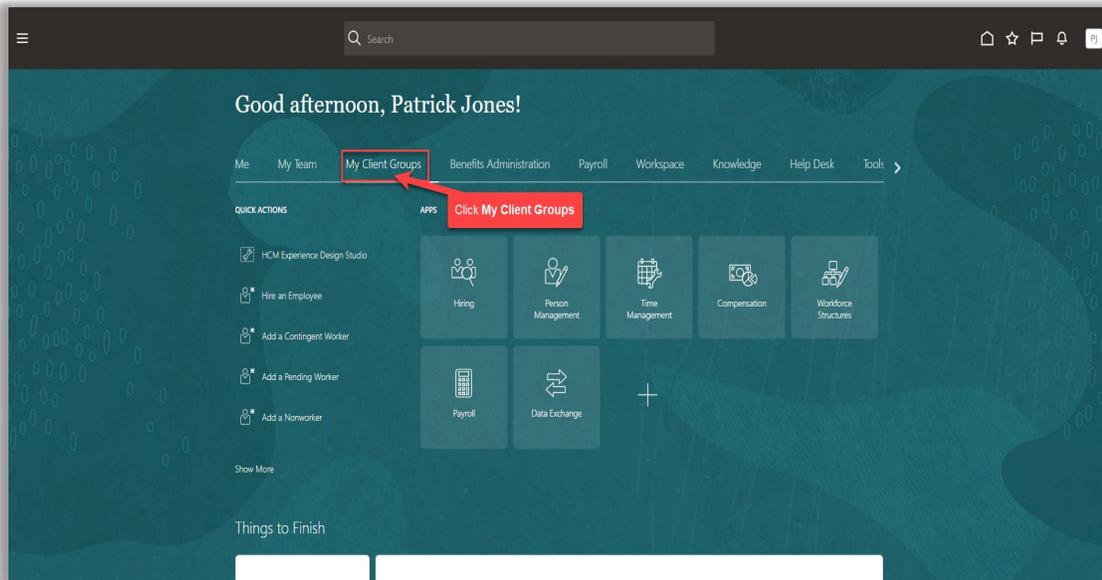
- ✦ We can determine the number and types of tabs to display in the worksheet, columns displayed on each tab, the order in which they display, available menu actions, and we can add text instructions to the managers. We can import the entire worksheet configuration from another plan and then modify it for use in a new plan.

Workforce Preplanning

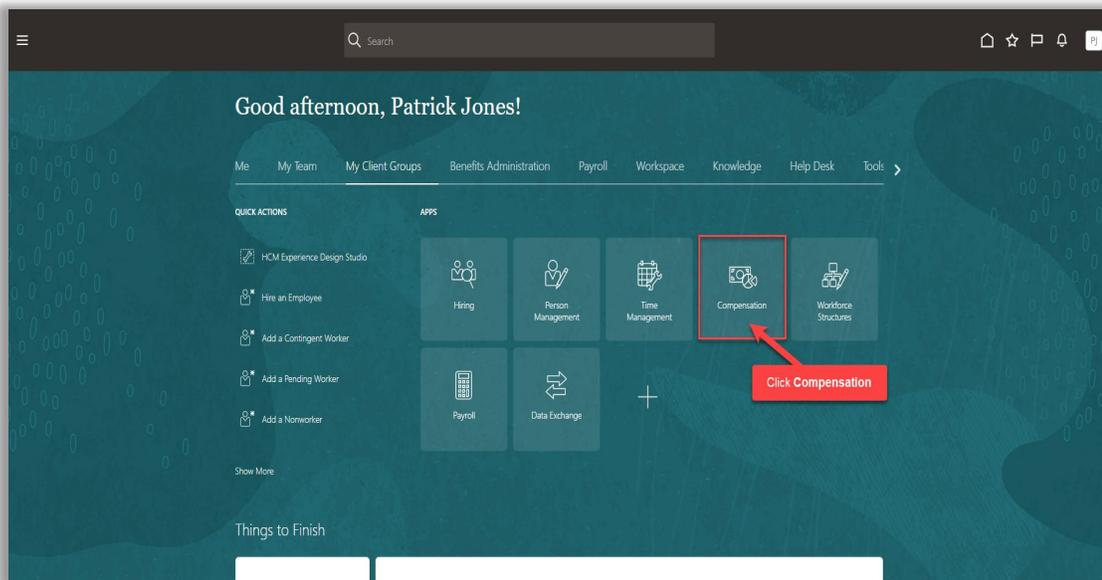
Configure Plan Details

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Plan Details>Enter or Update Information>Save and Close

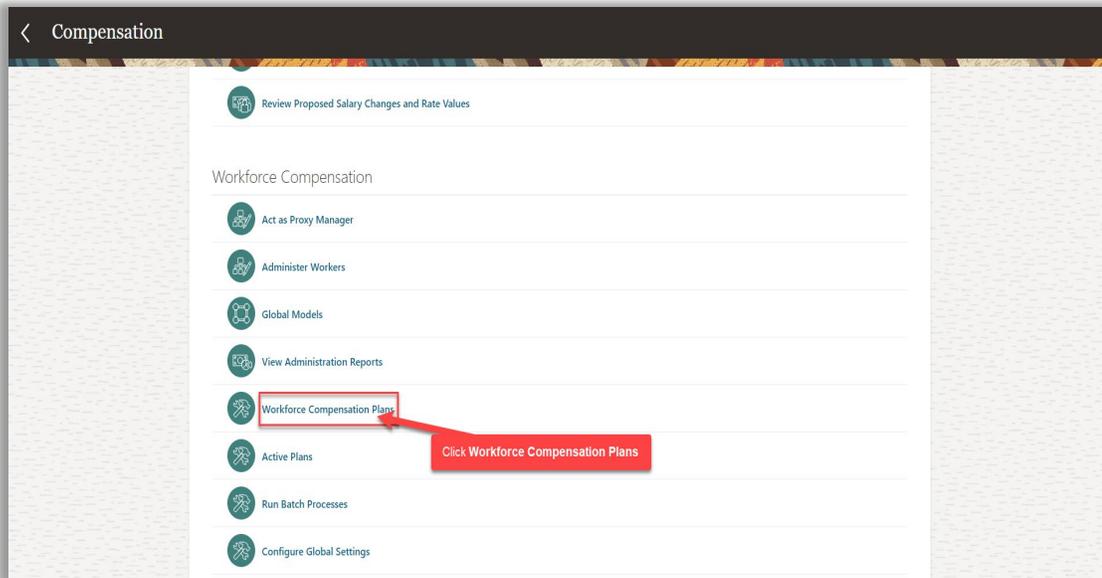
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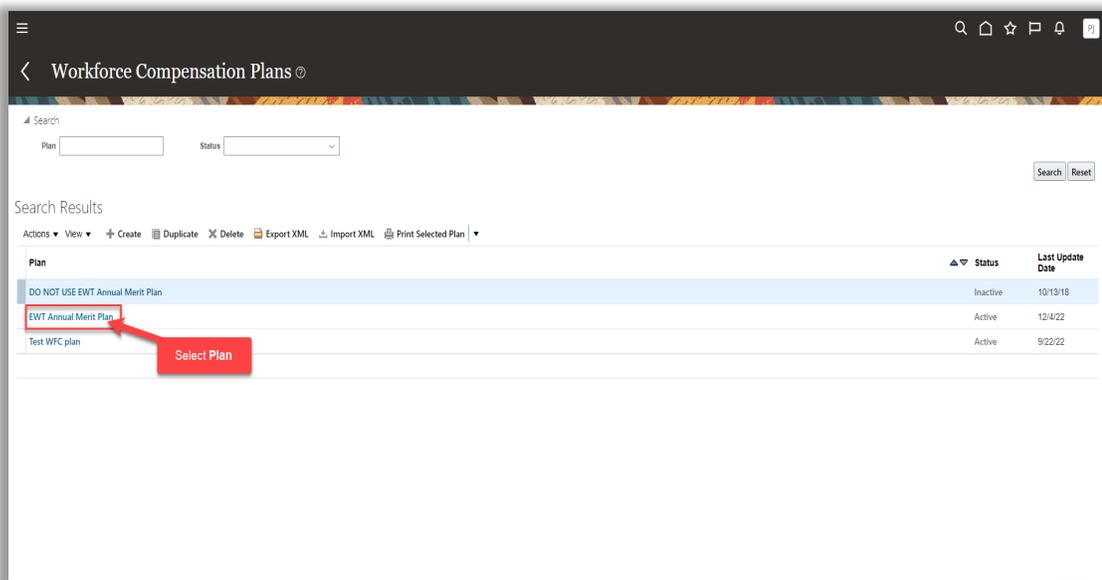
Next, click **Compensation**



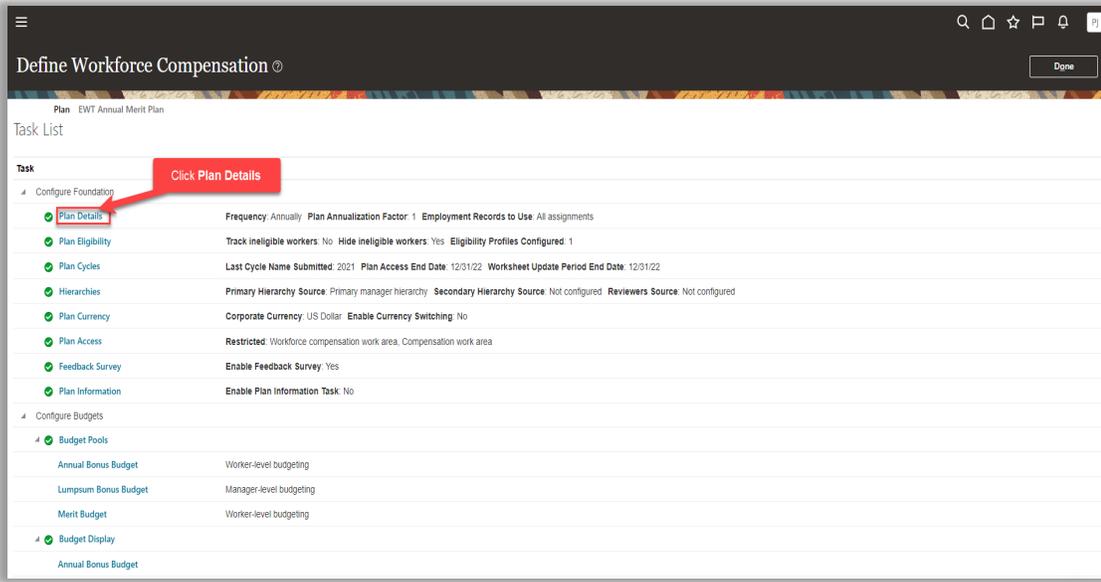
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



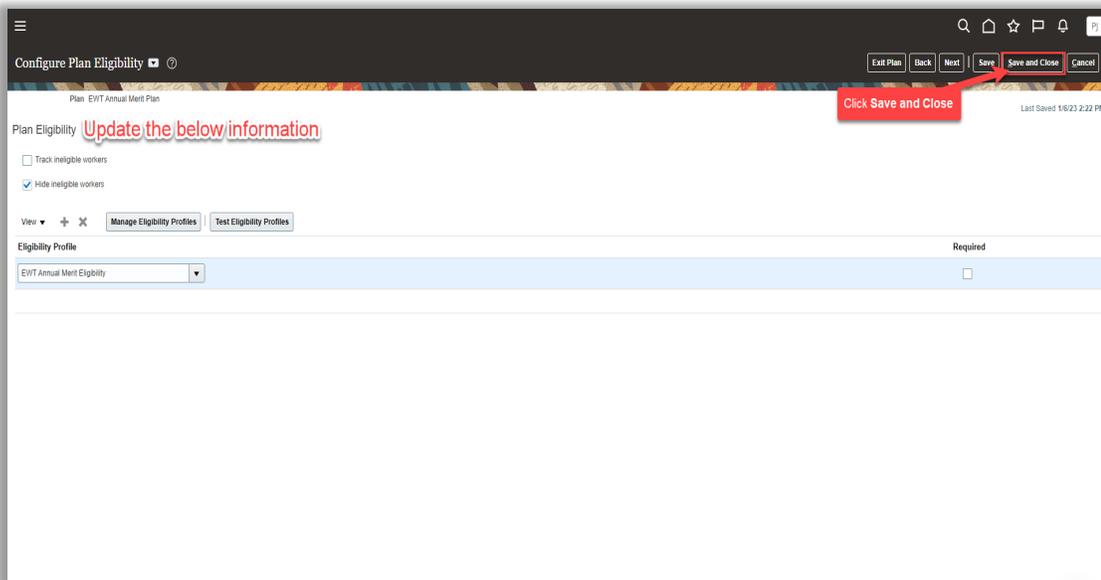
Select the Plan



Click **Plan Details**



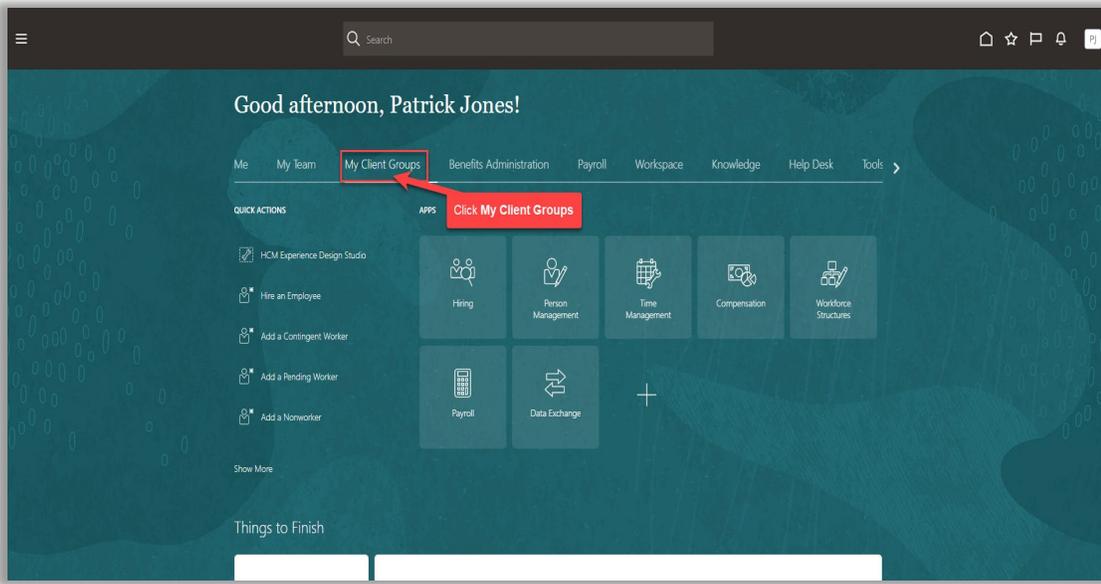
Enter or update the **Plan Details**. Click **Save and Close**



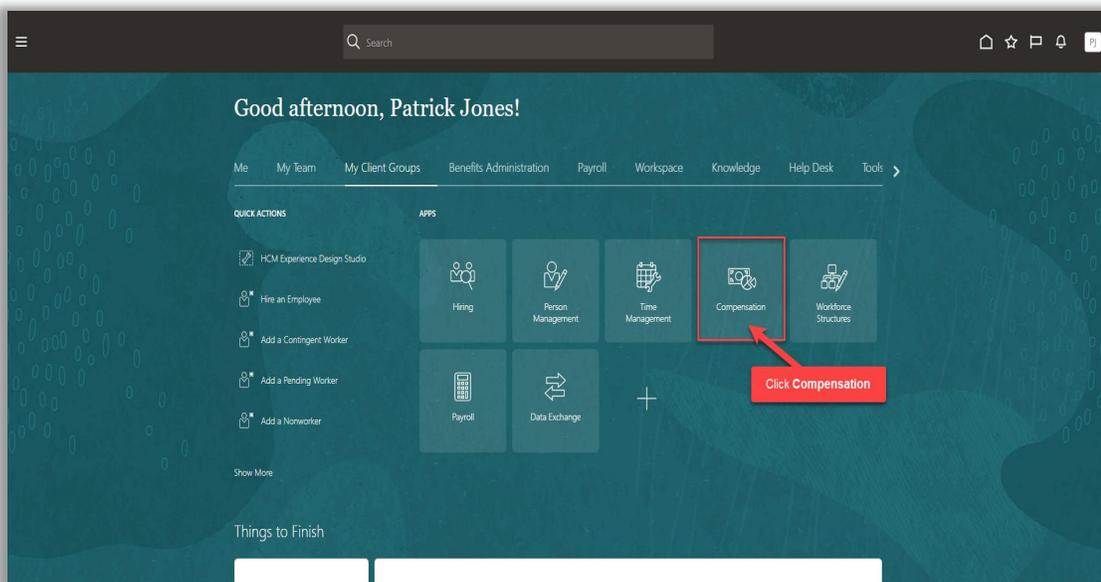
Configure Plan Eligibility

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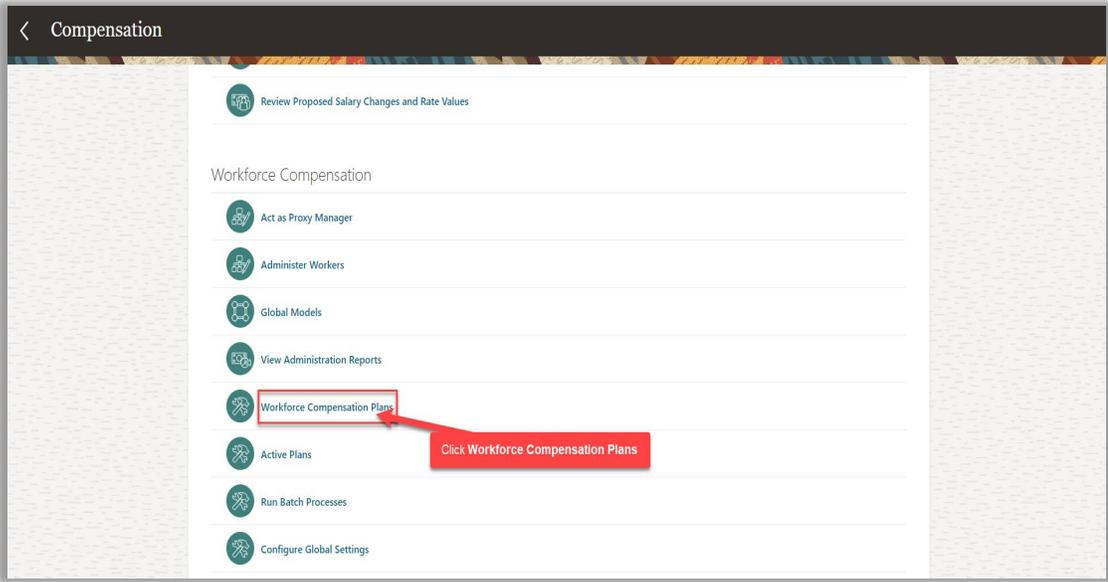
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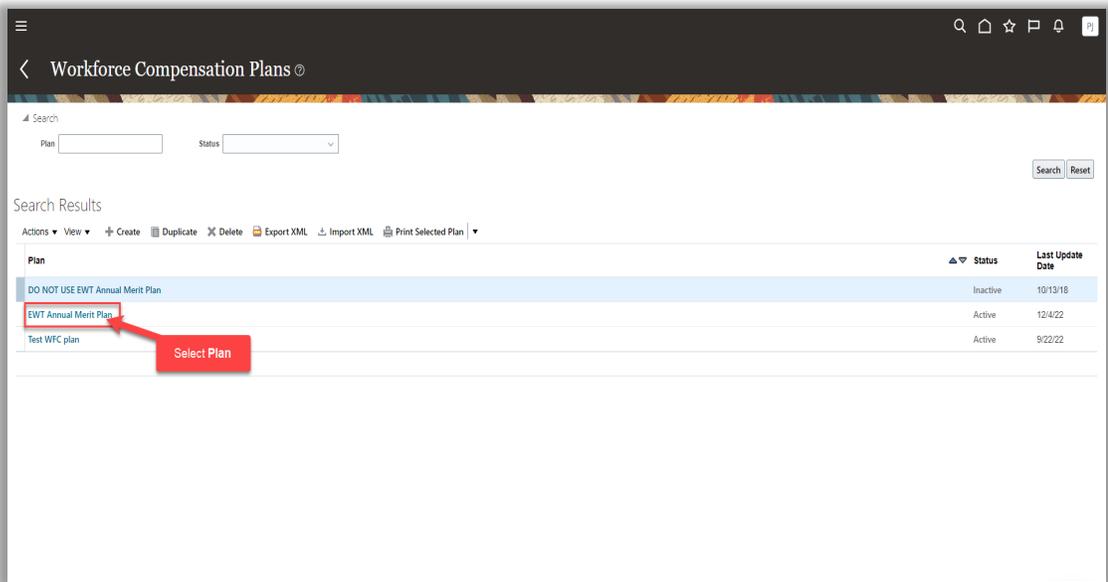
Next, click **Compensation**



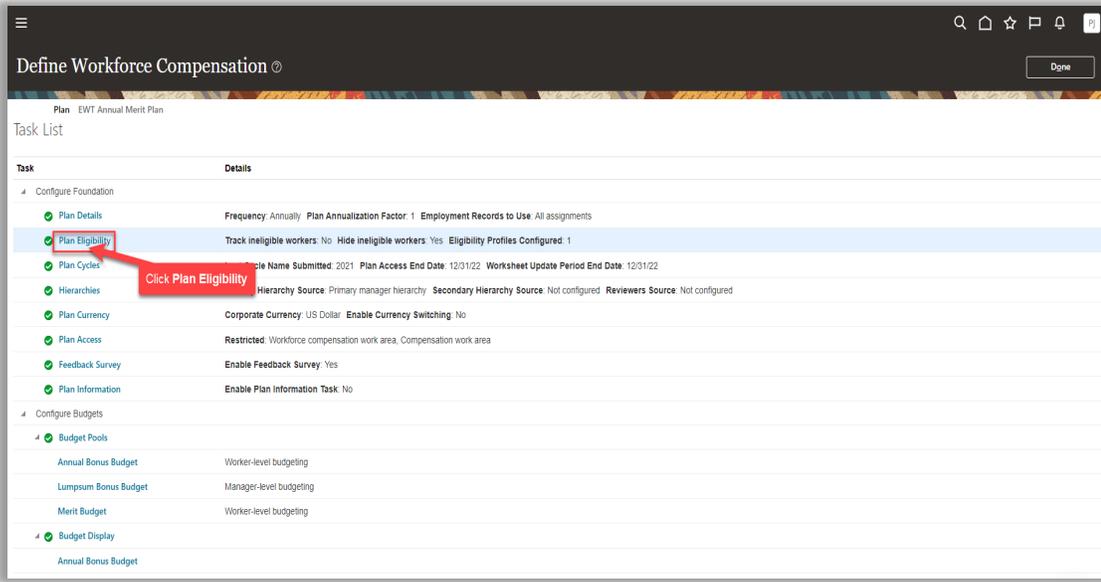
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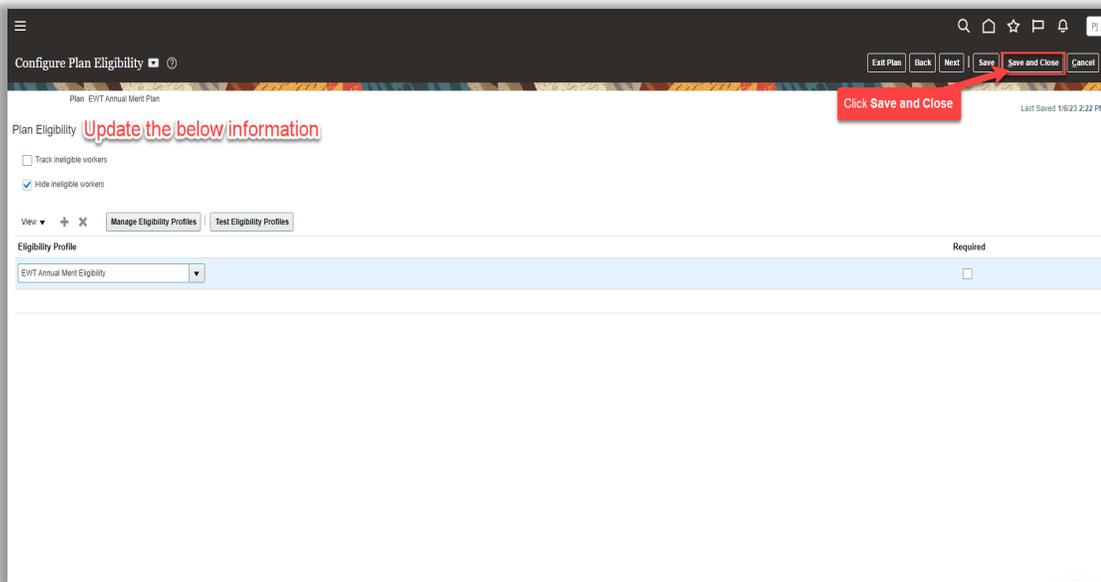
Select the Plan



Click Plan Eligibility



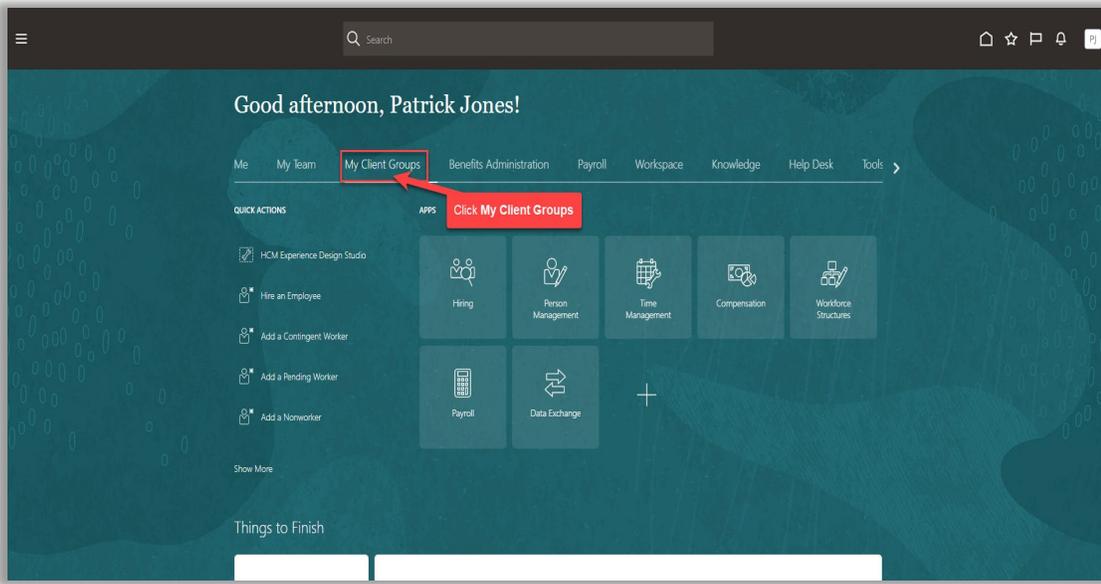
Enter or update the **Plan Eligibility**. Click **Save and Close**



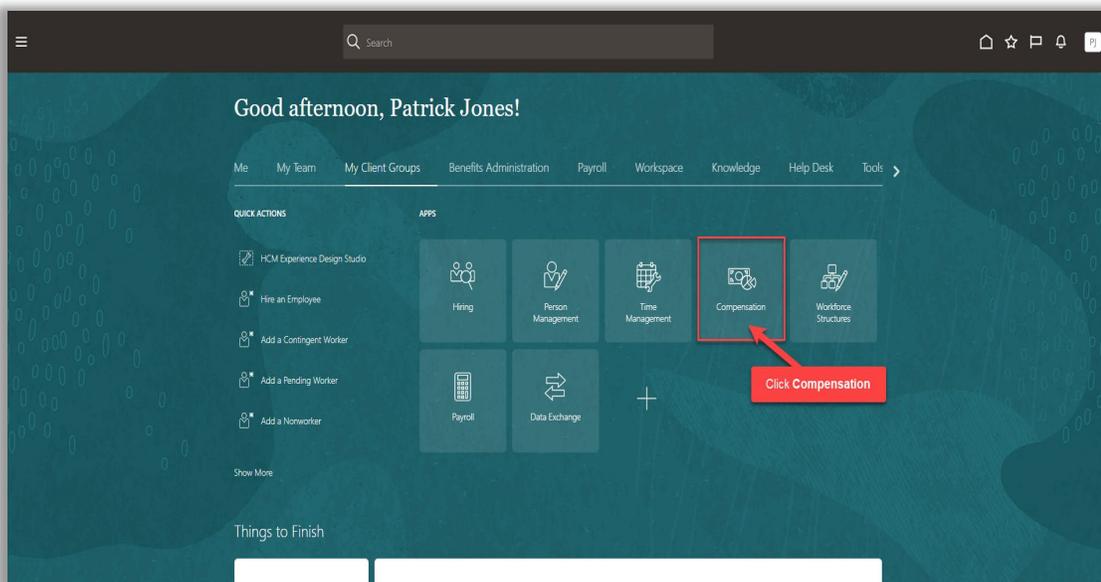
Configure Plan Cycles

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Plan Cycles> Enter or Update Information or Create>Save and Close

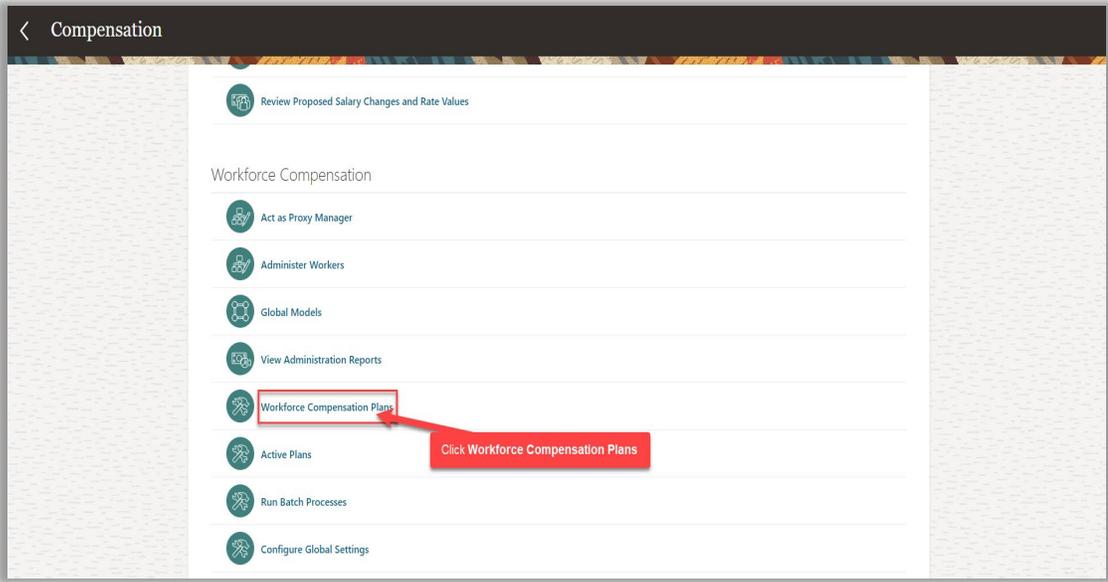
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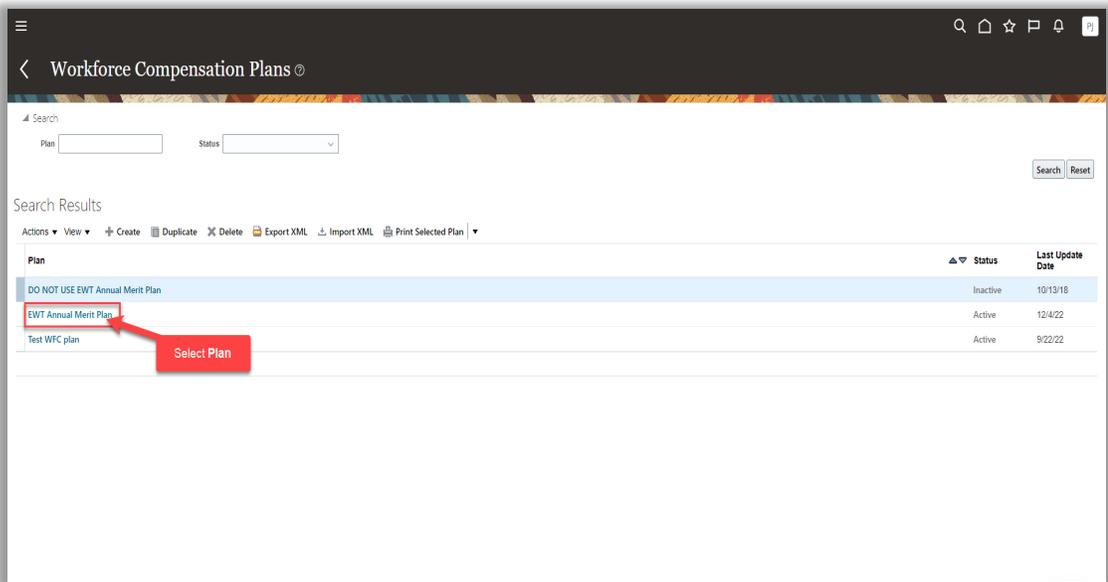
Next, click **Compensation**



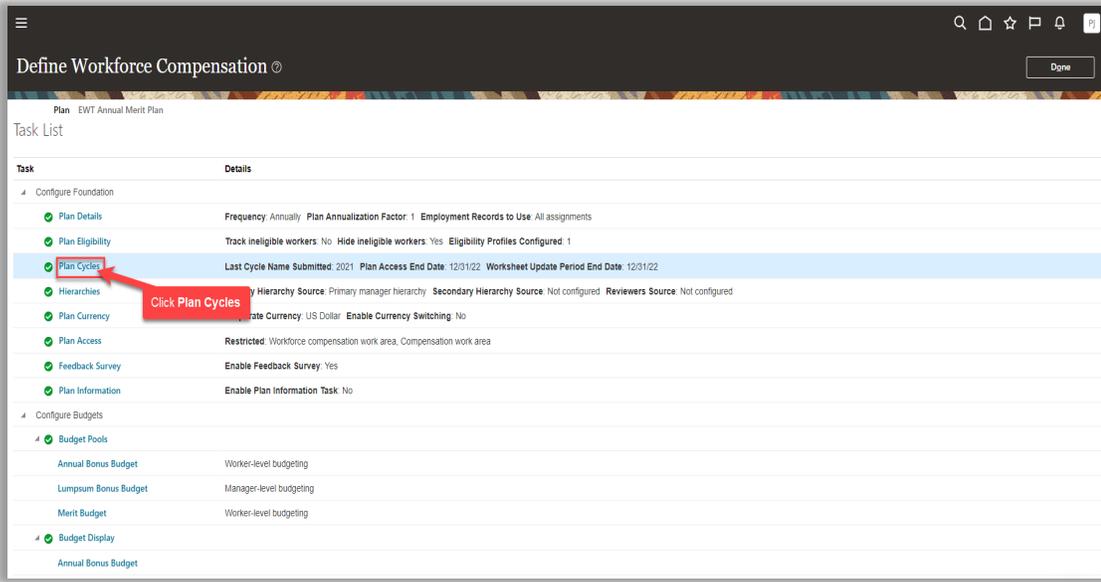
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



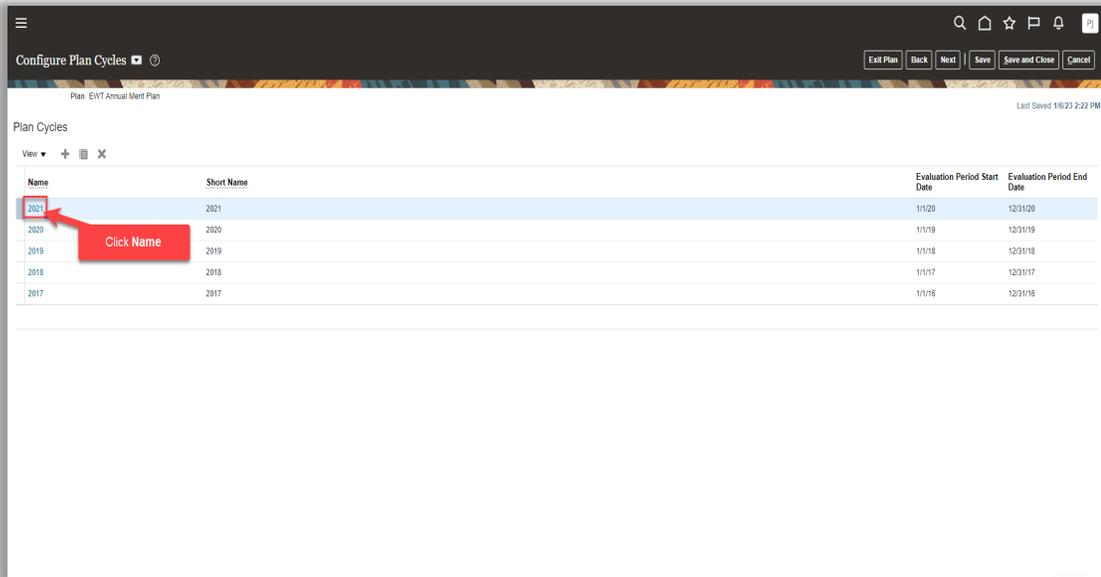
Select the Plan



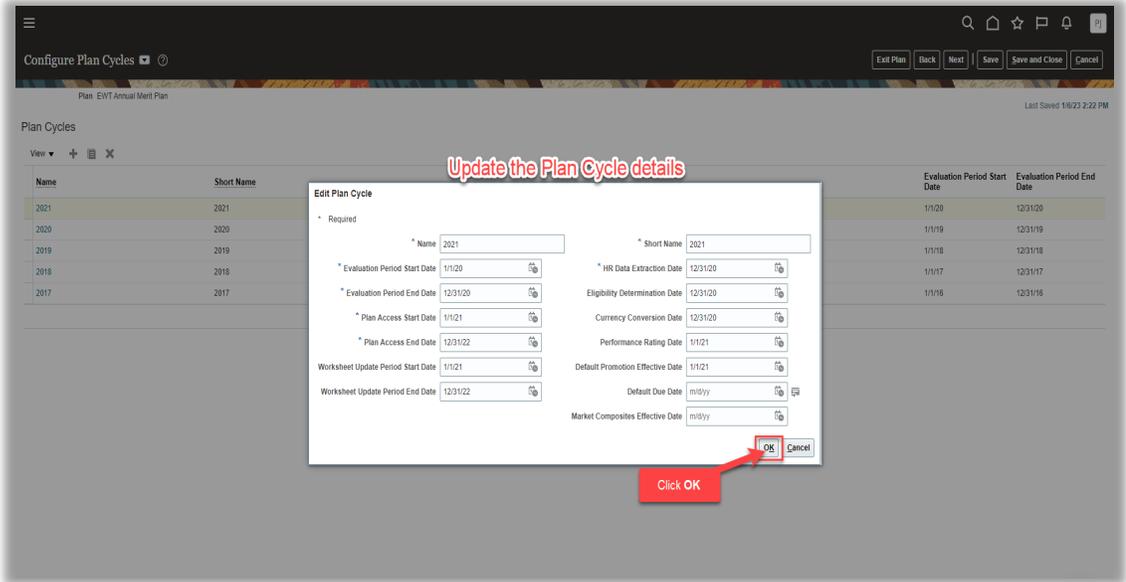
Click Plan Cycles



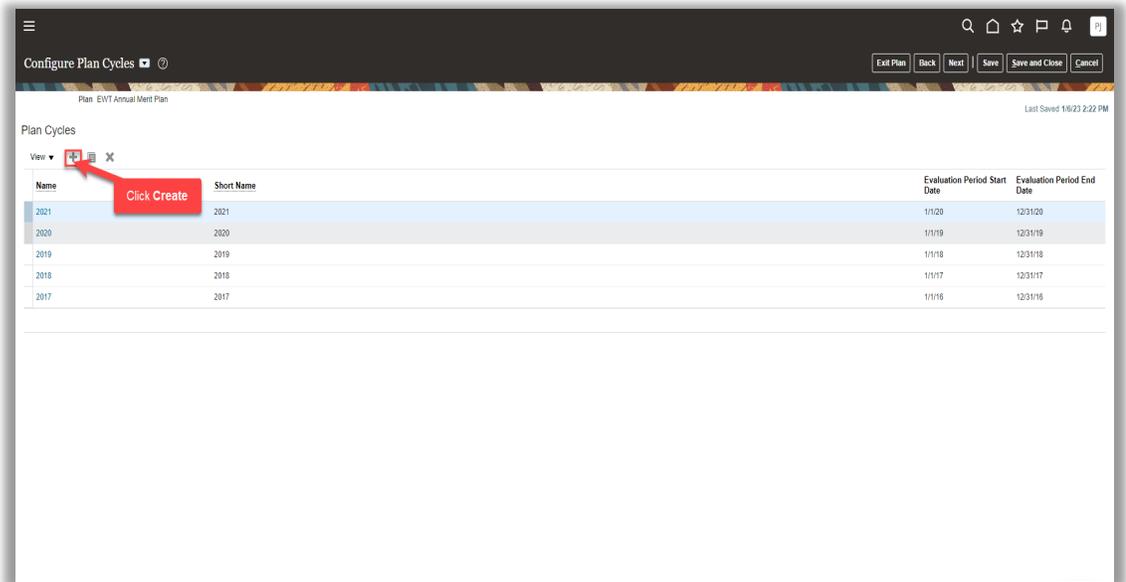
To update a **Plan Cycle**, click the **Plan Cycle** we wish to update



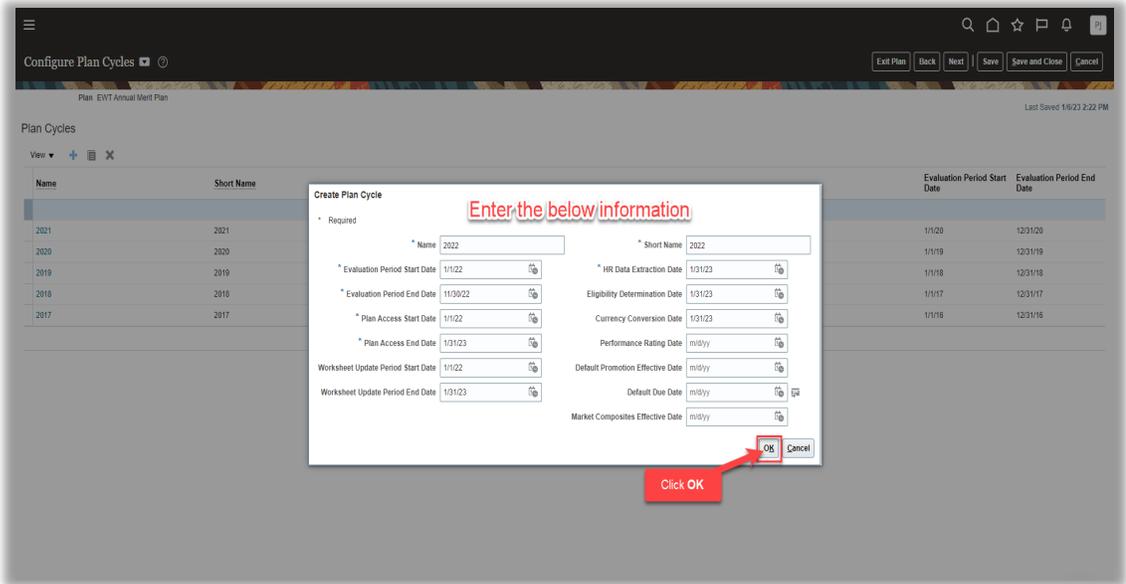
Update the **Plan Cycle** Information and click **OK**



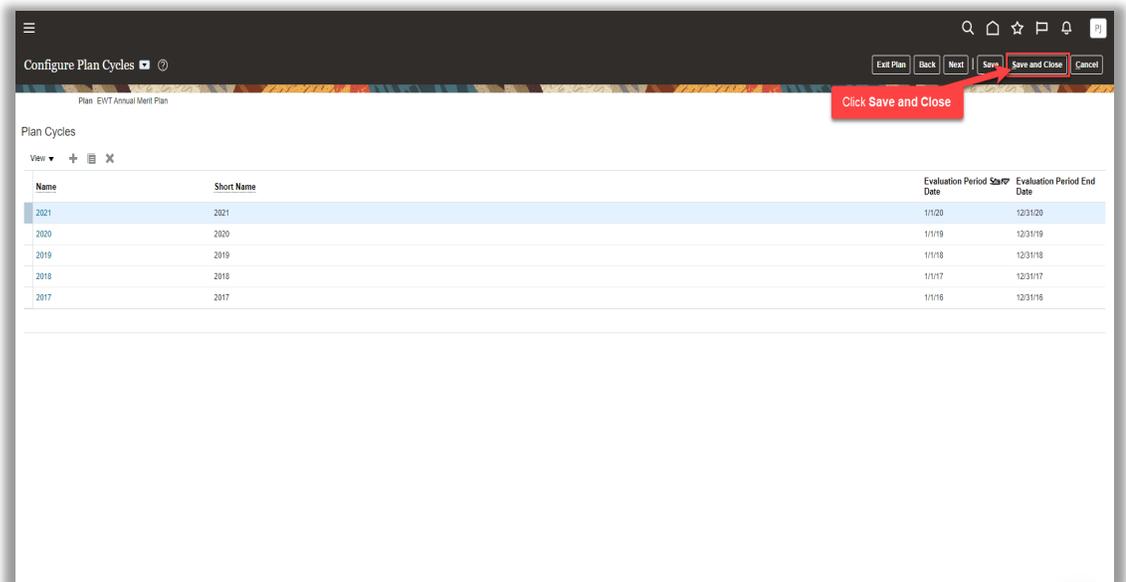
To add a new Plan Cycle, click **Create**



Enter the **Create Plan Cycle Information** and click **OK**



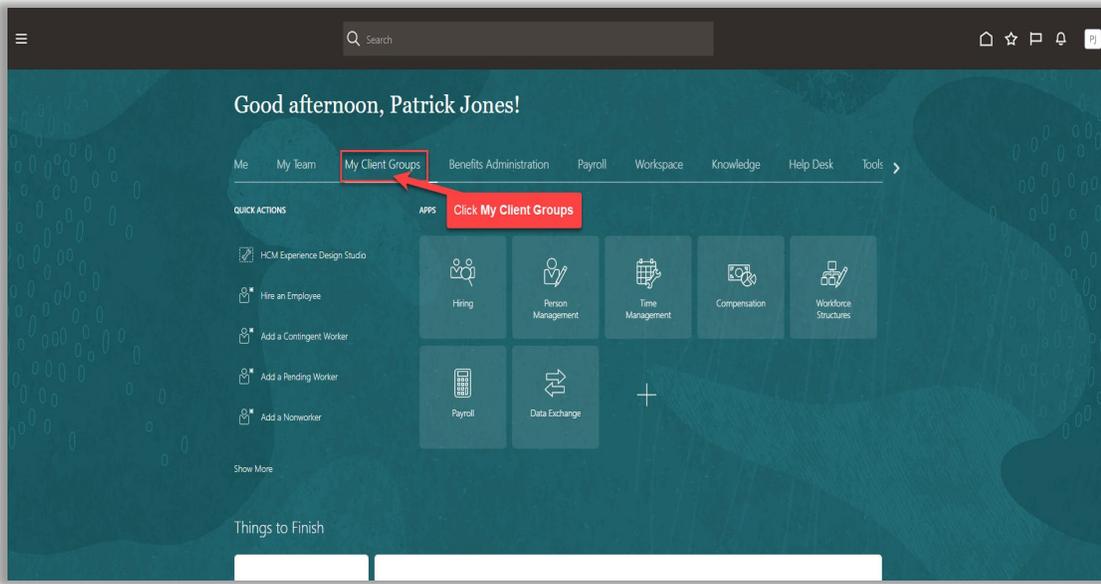
Click Save and Close



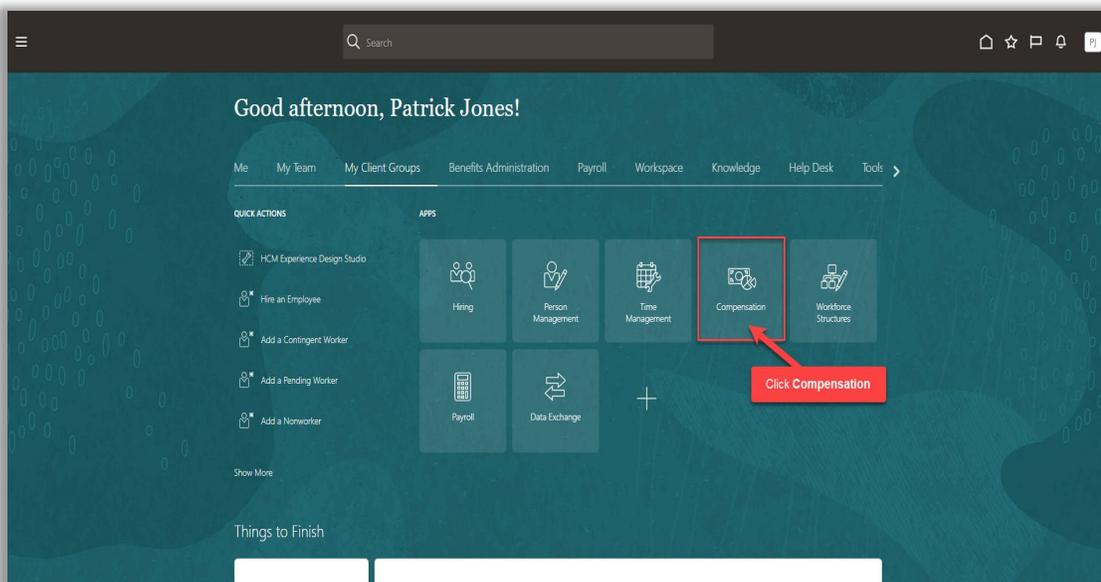
Configure Plan Hierarchies

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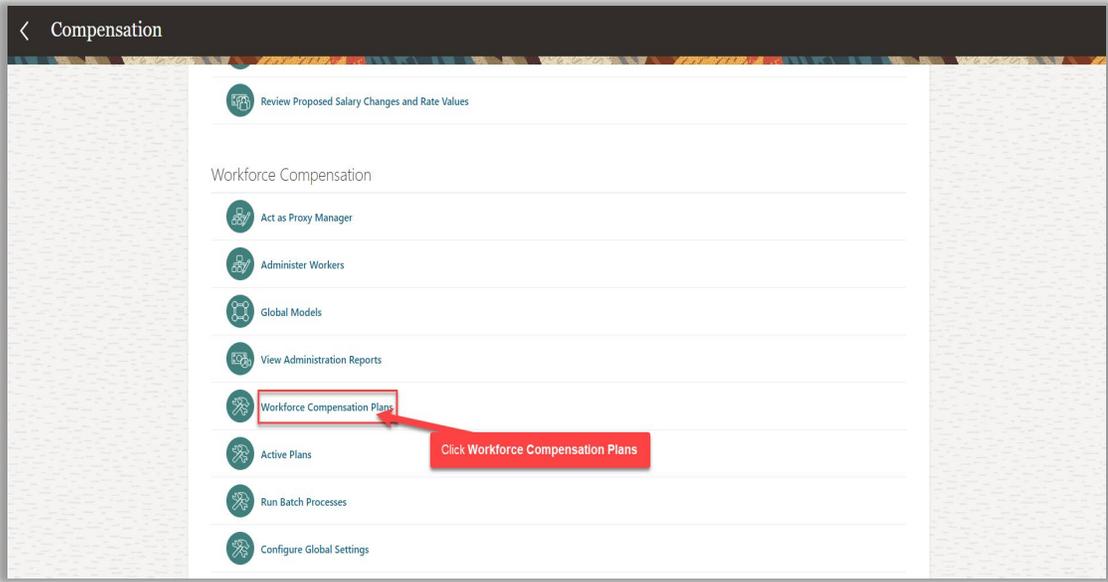
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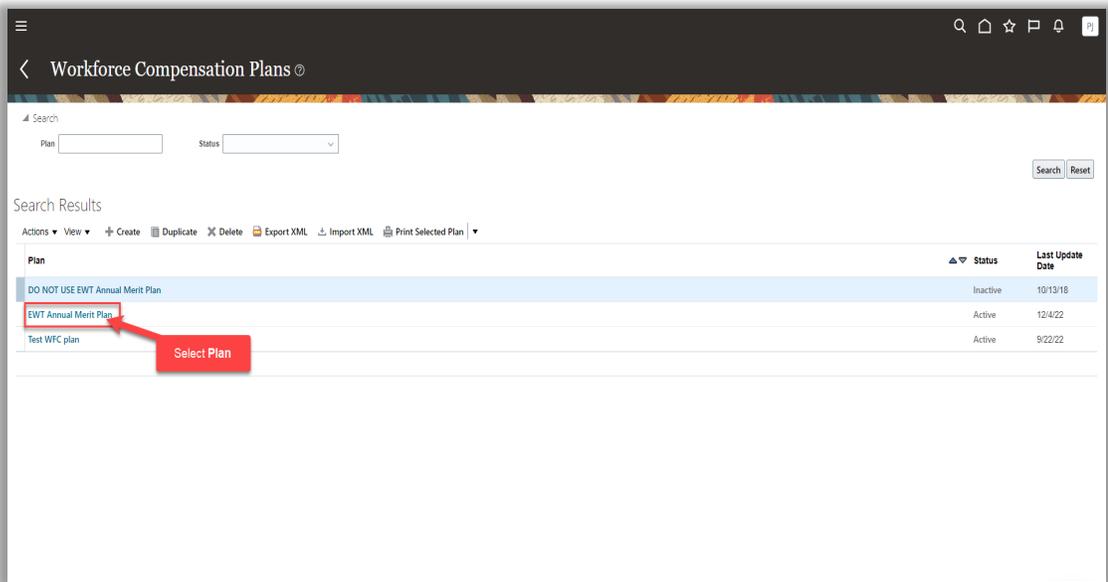
Next, click **Compensation**



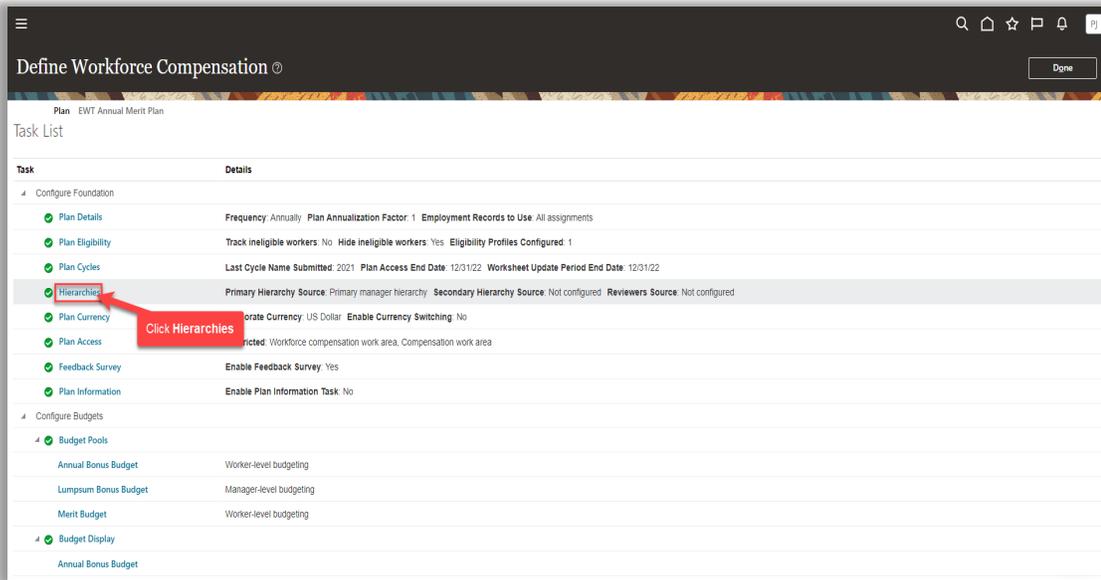
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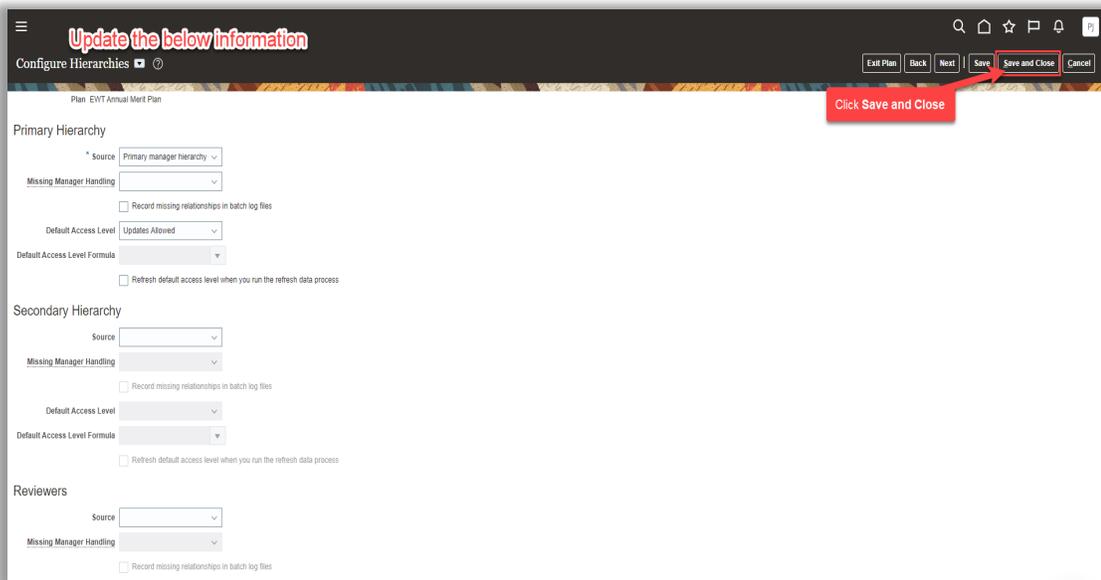
Select the Plan



Click Hierarchies



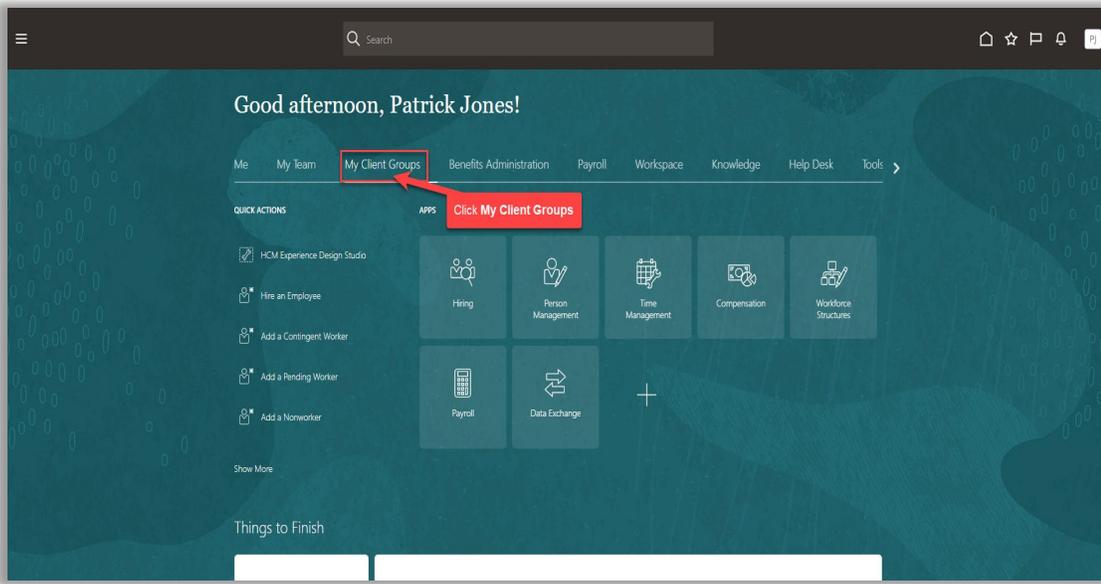
Next, update the **Primary Hierarchy, Secondary Hierarchy, and Reviewers**. Click **Save and Close**



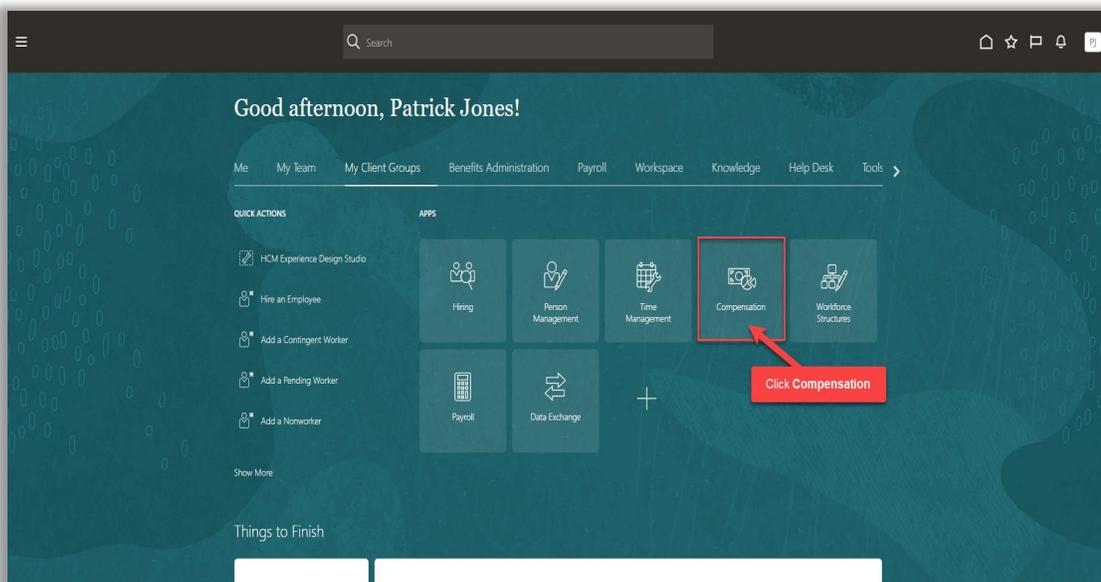
Configure Plan Access

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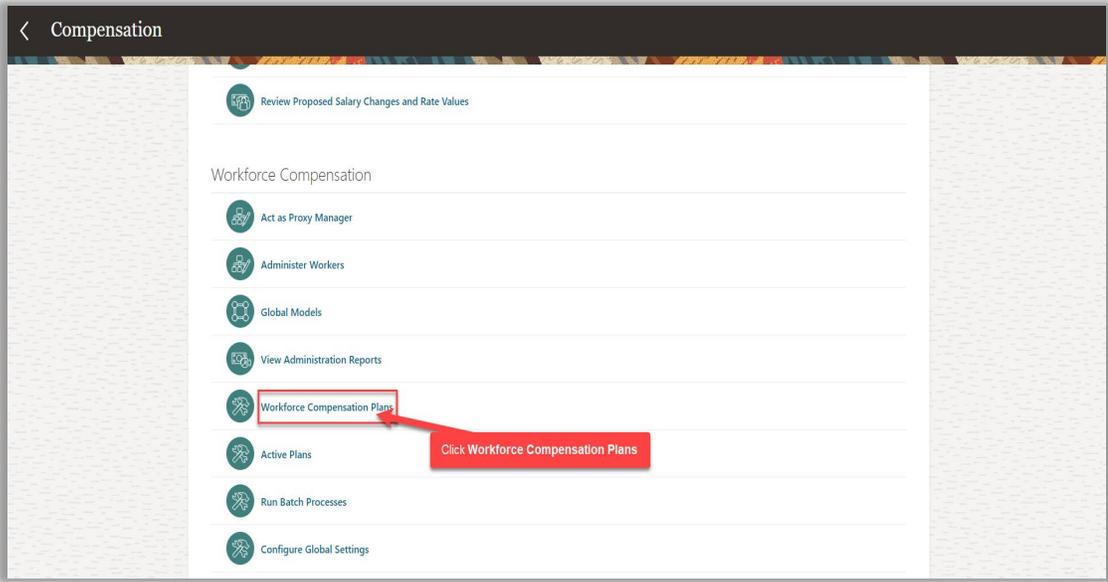
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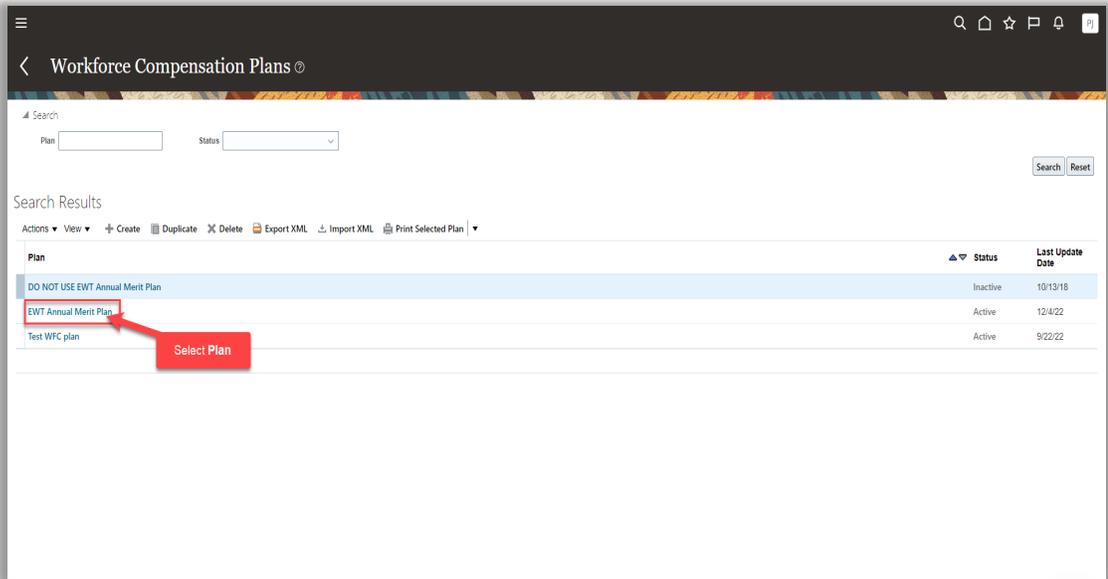
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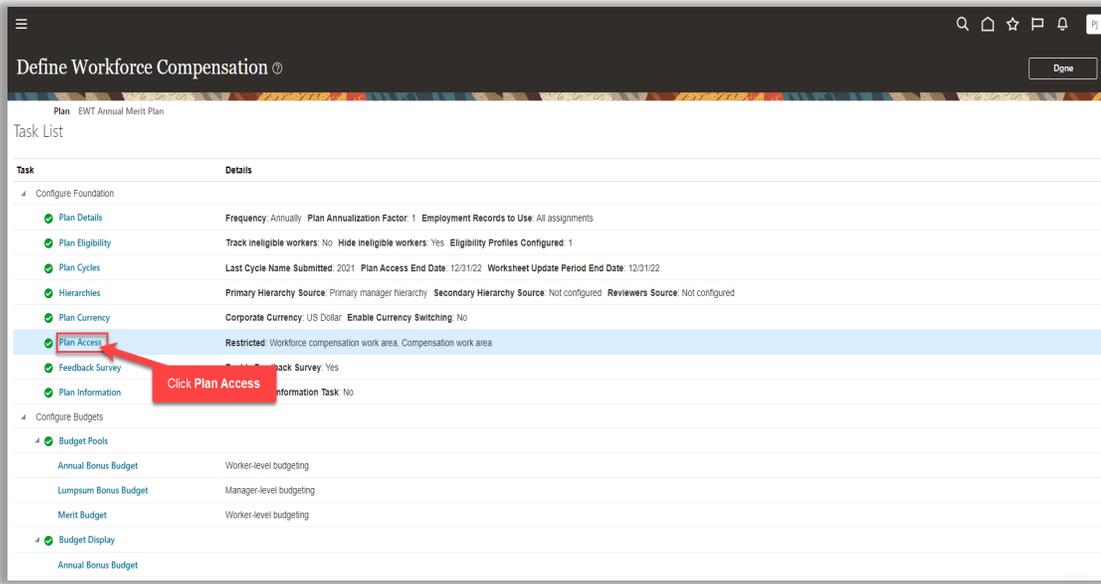
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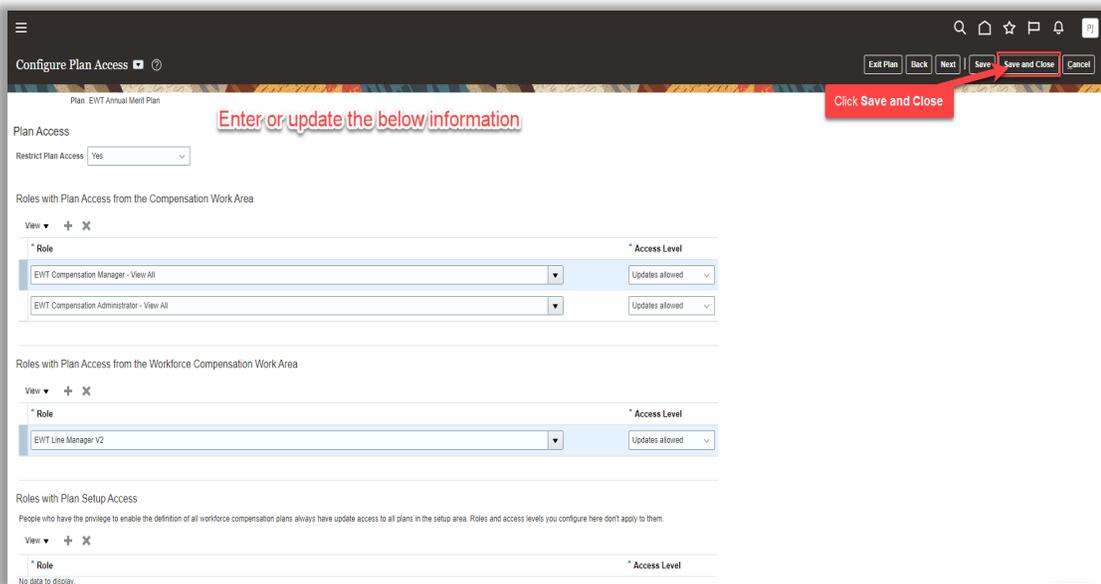
Select the Plan



Click Plan Access



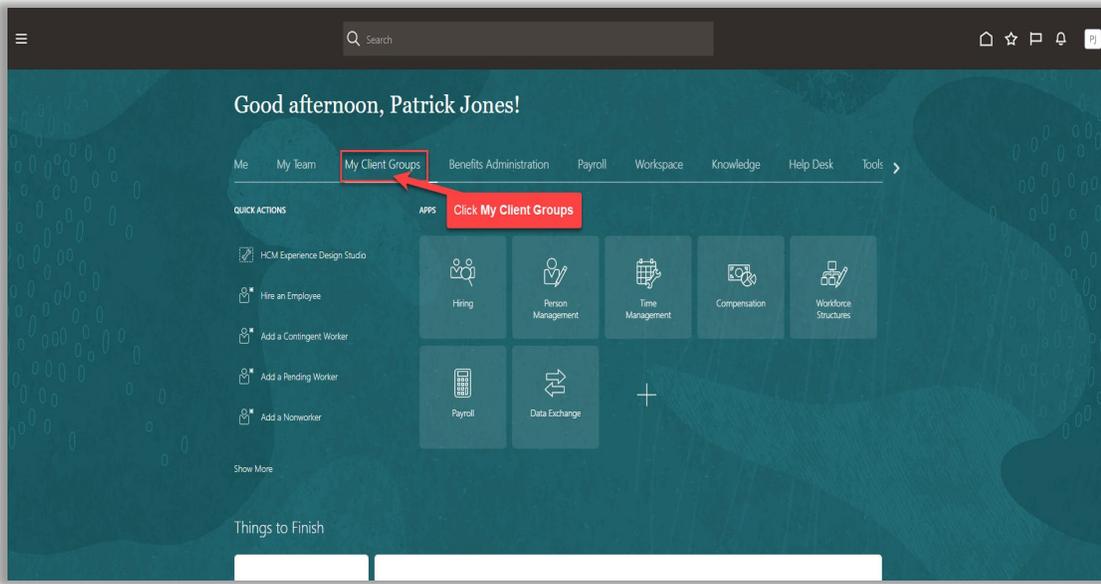
Here we can update the **Plan Access** and the **Roles**. Click **Save and Close**



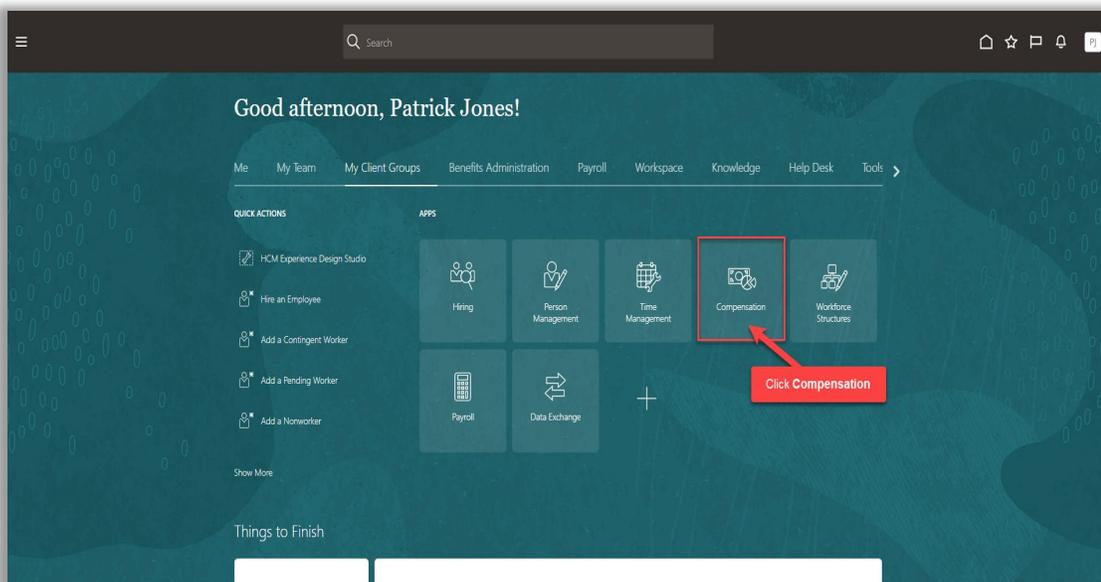
Configure Feedback Survey

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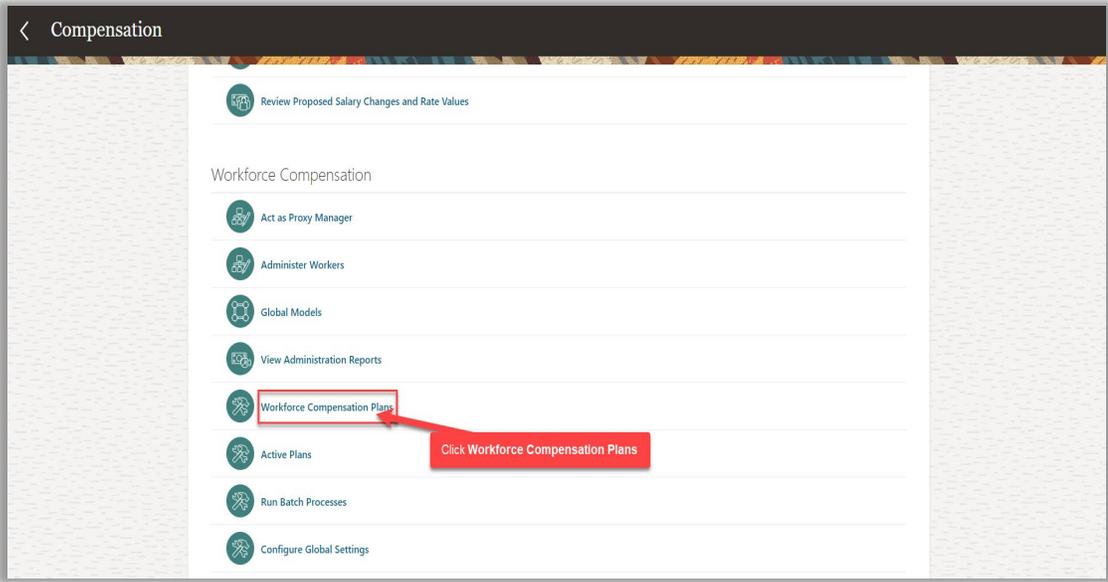
From the home screen, click **My Client Groups**



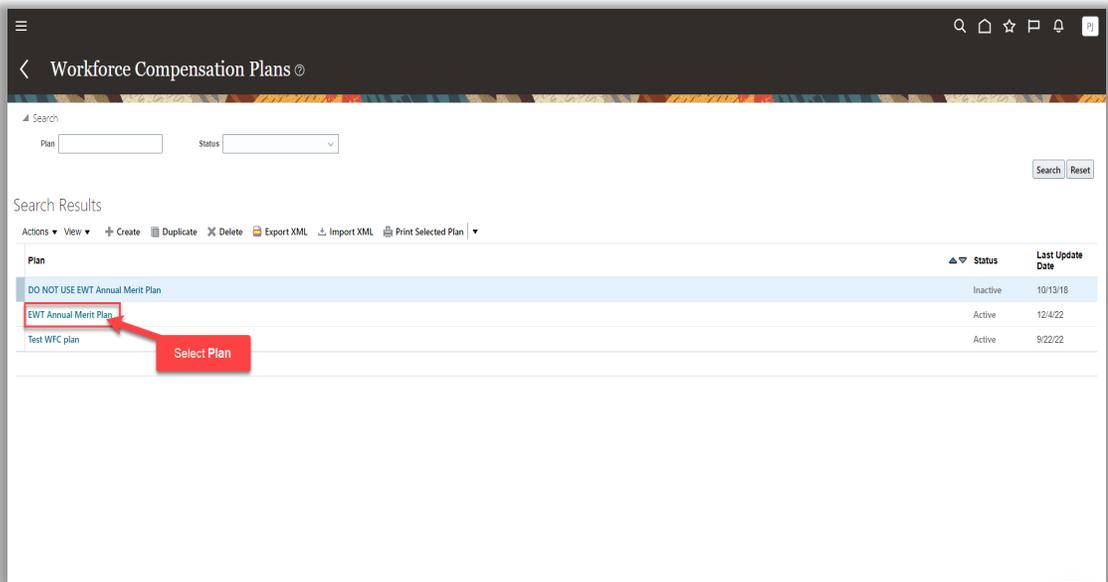
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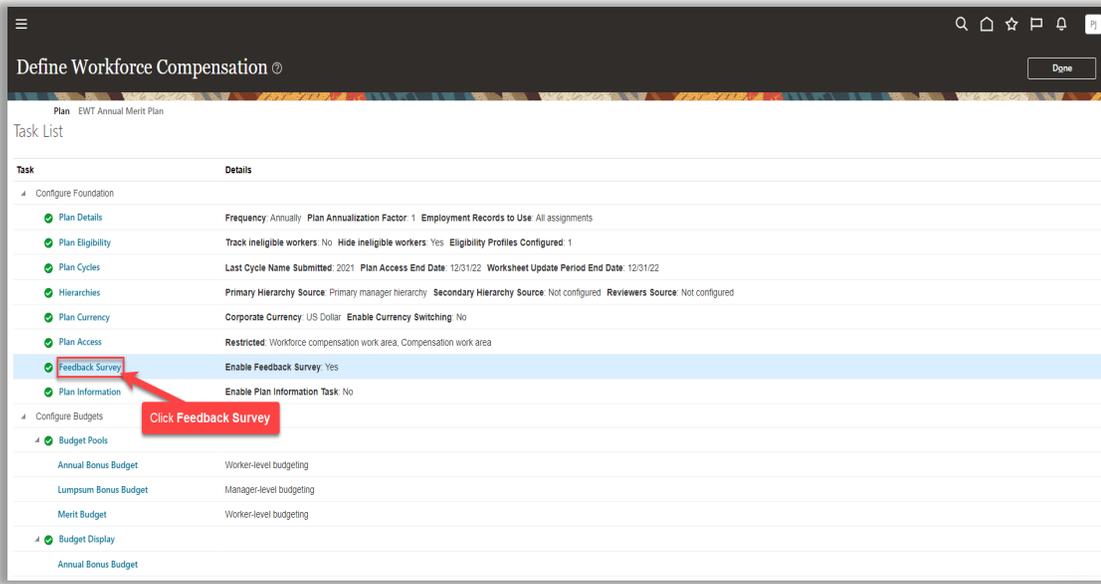
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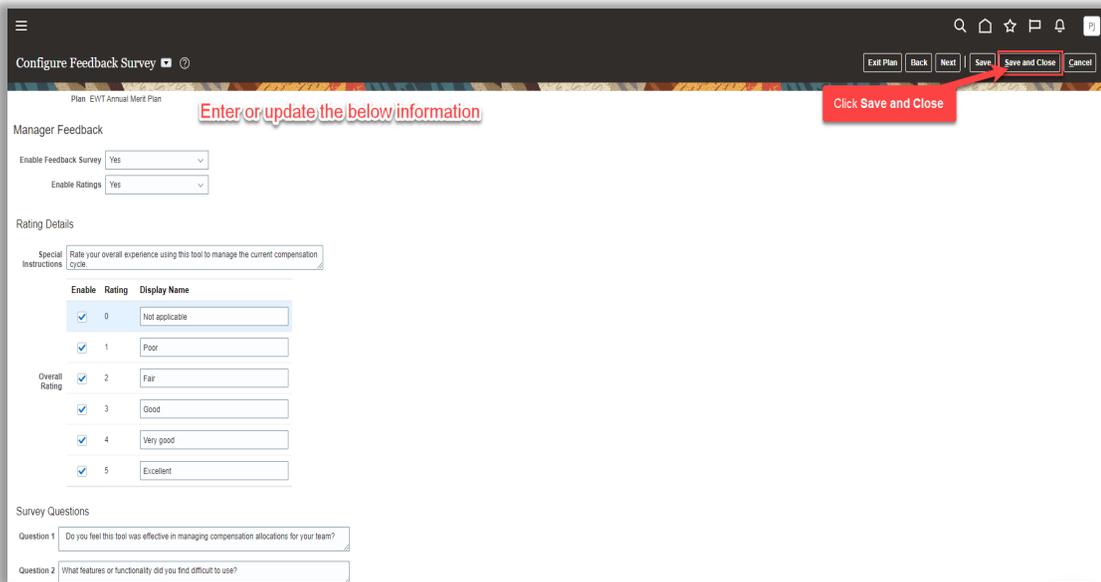
Select the Plan



Click Feedback Survey



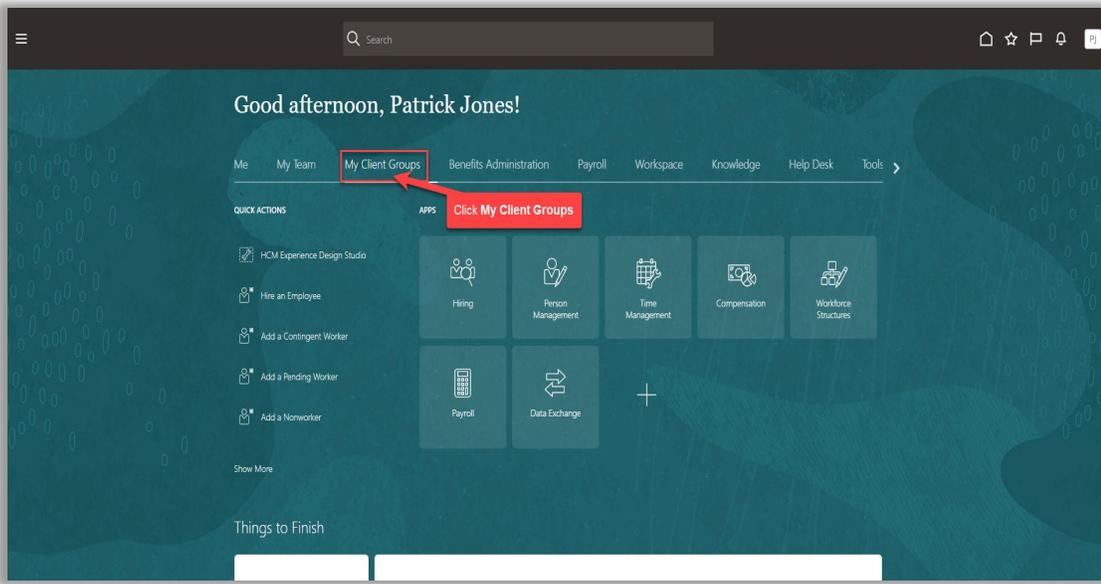
Here we can enter or update the **Manager Feedback, Rating Details, and Survey Questions**. Click **Save and Close**



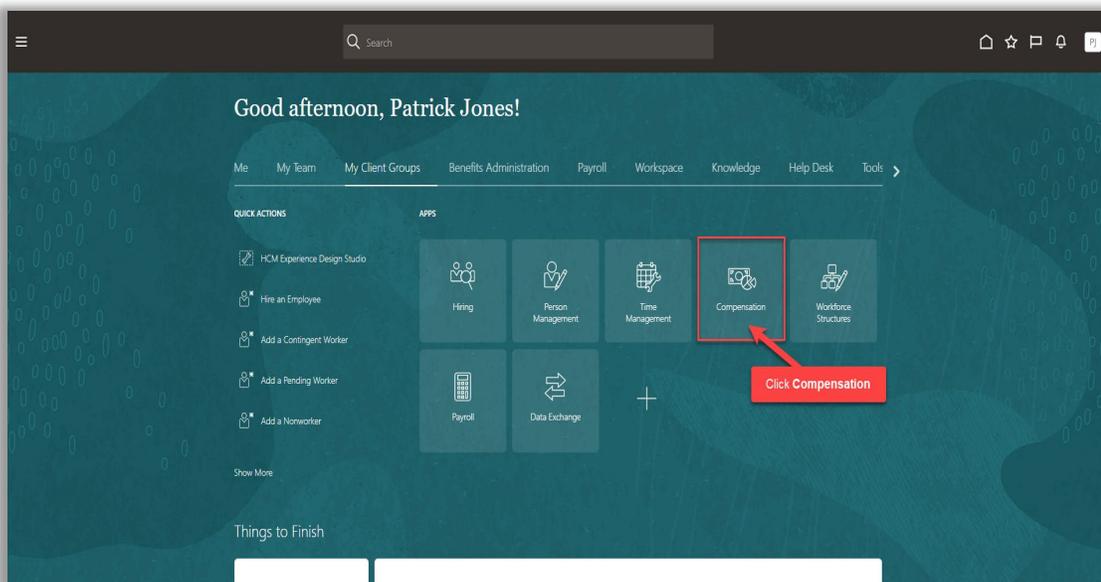
Configure Budget Overview

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Budget Pools>Enter or Update Information>Save and Close

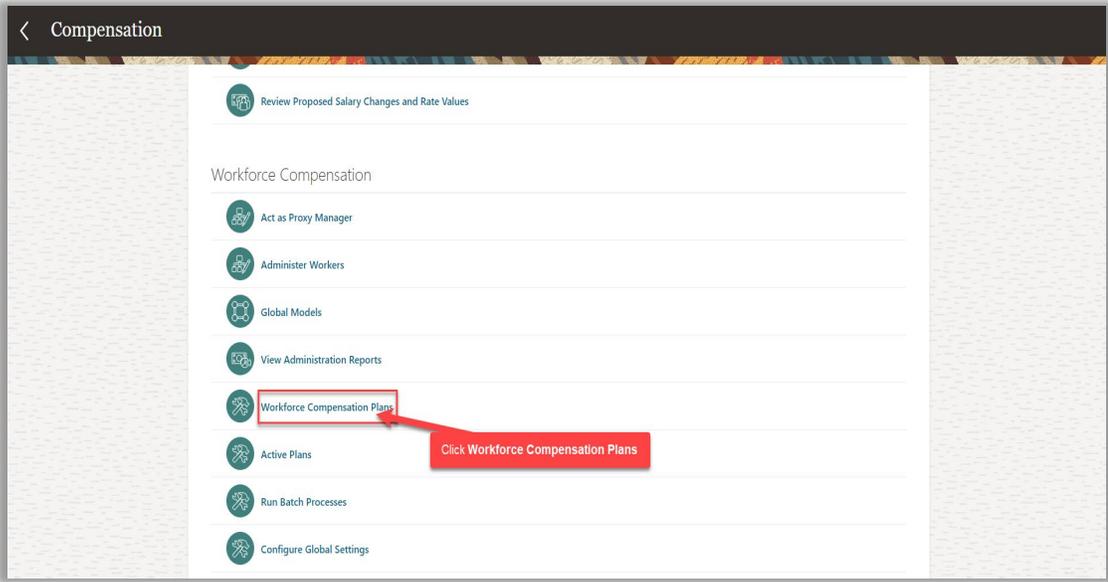
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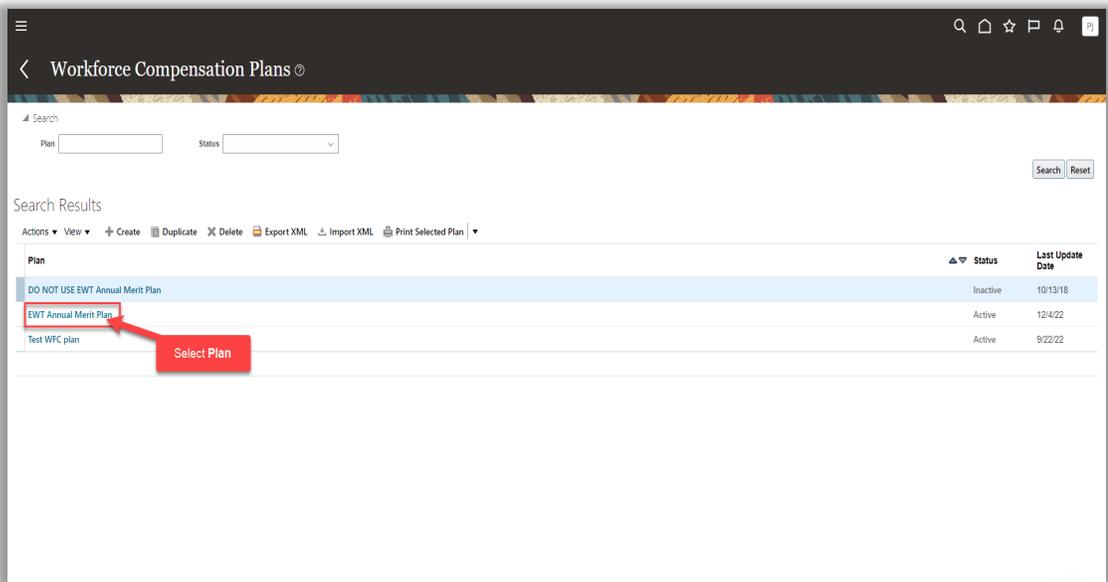
Next, click **Compensation**



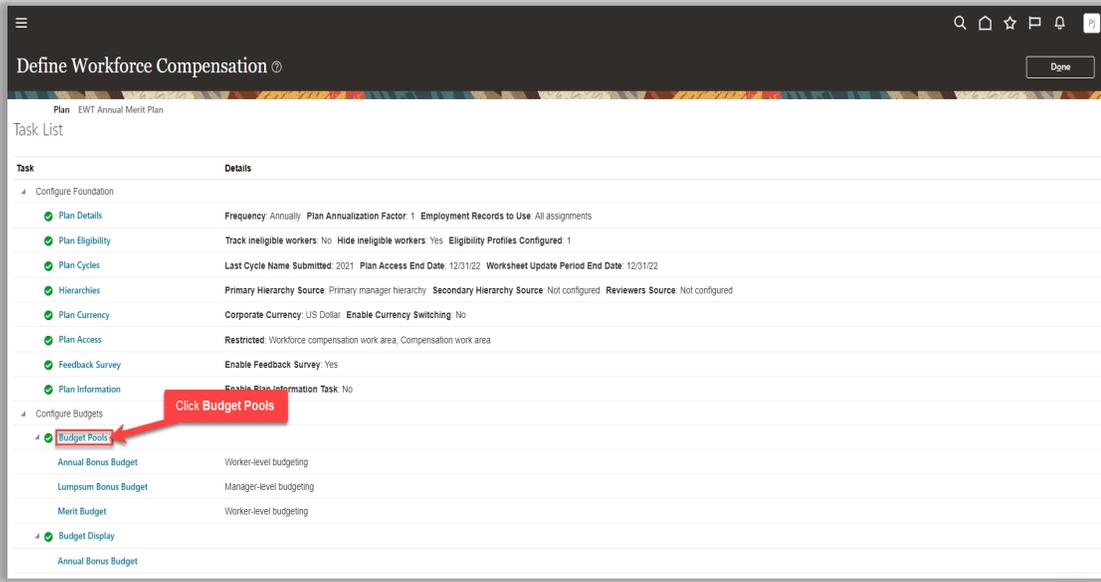
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



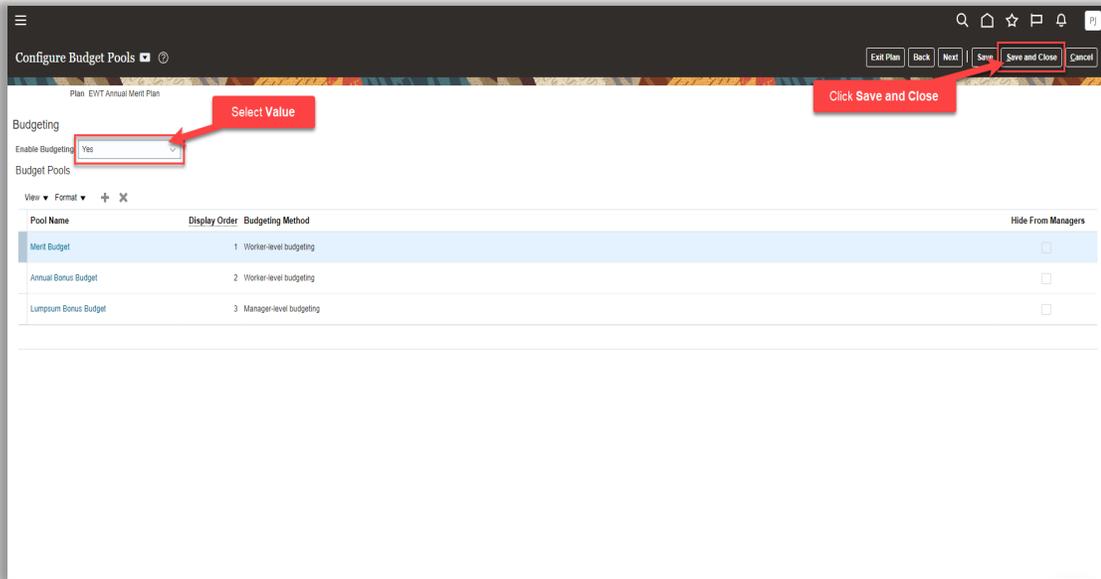
Select the Plan



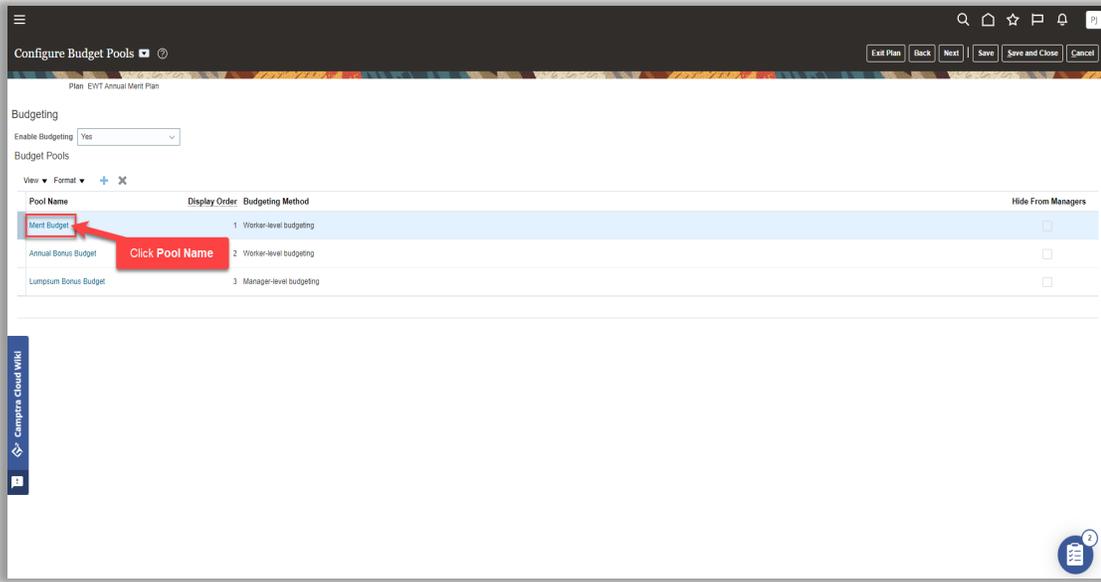
Click Budget Pools



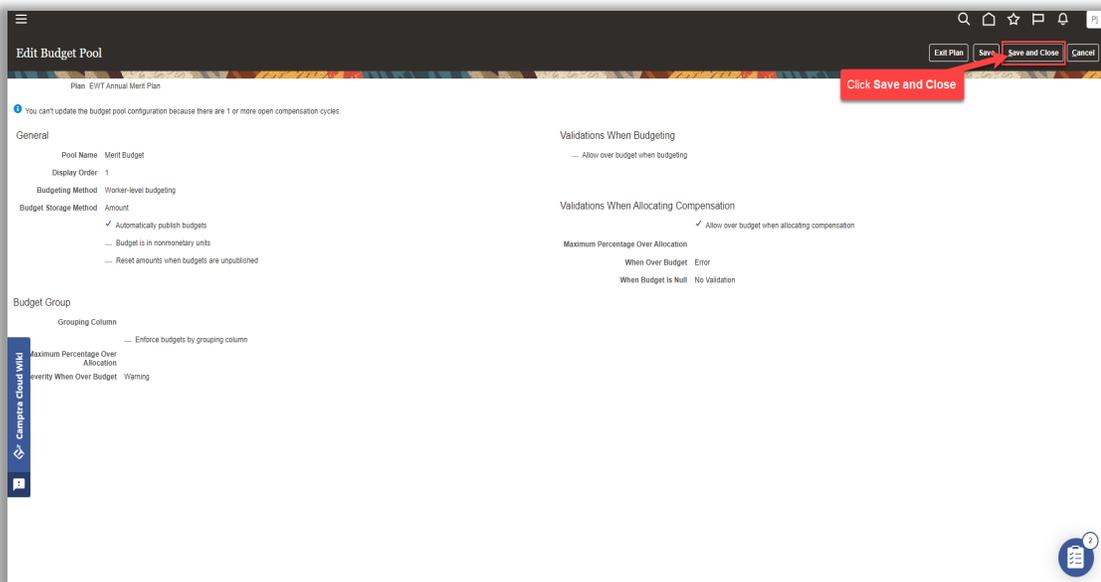
We can Enable Budgeting from the dropdown. Click Save and Close



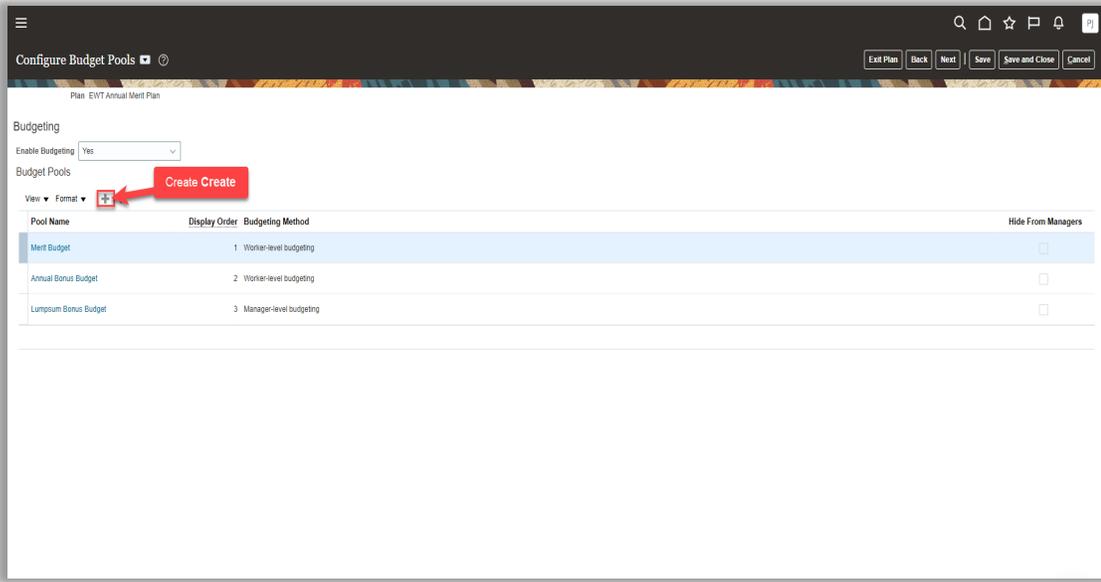
We can also manage the various **Budget Pools** such as **Merit Budget**, **Annual Bonus Budget**, and **Lumpsum Bonus Budget**. To update, click the applicable **Pool Name**



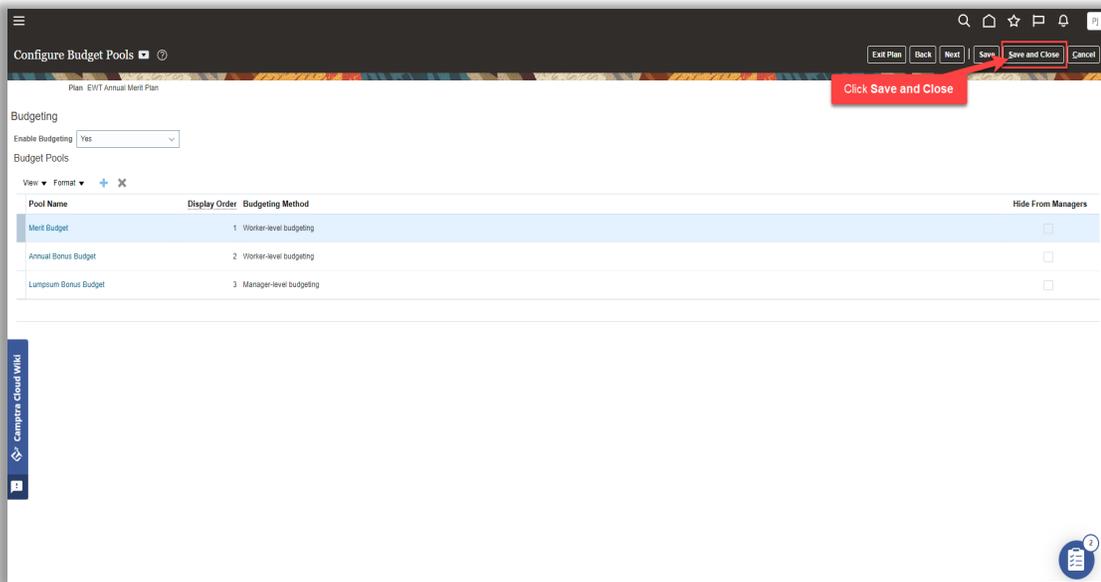
Next, make the applicable updates and click **Save and Close**



To add a **Budget Pool**, click **Create**



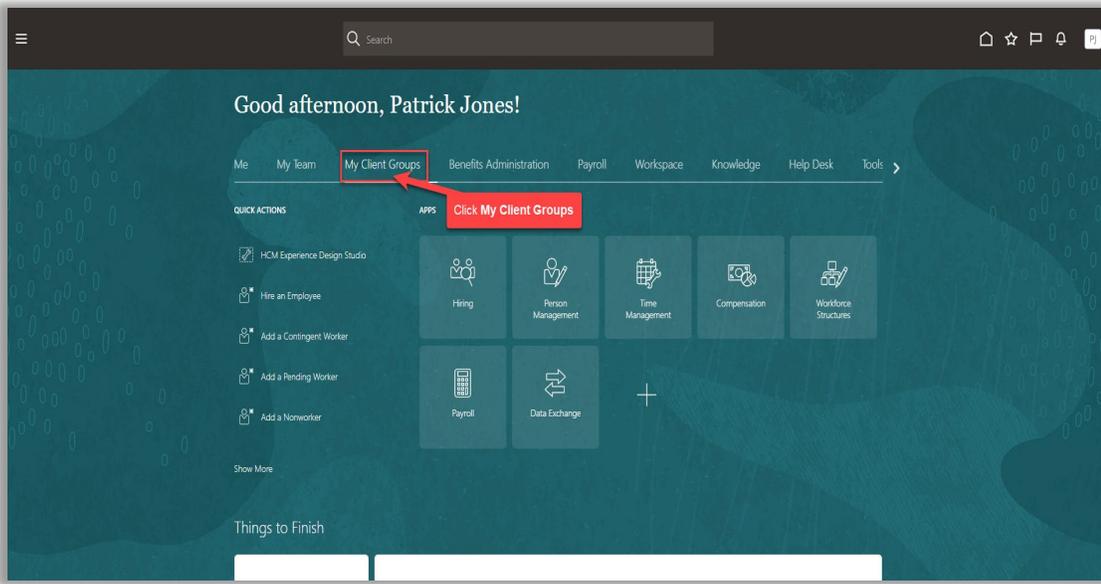
Enter the applicable information and click **Save and Close**



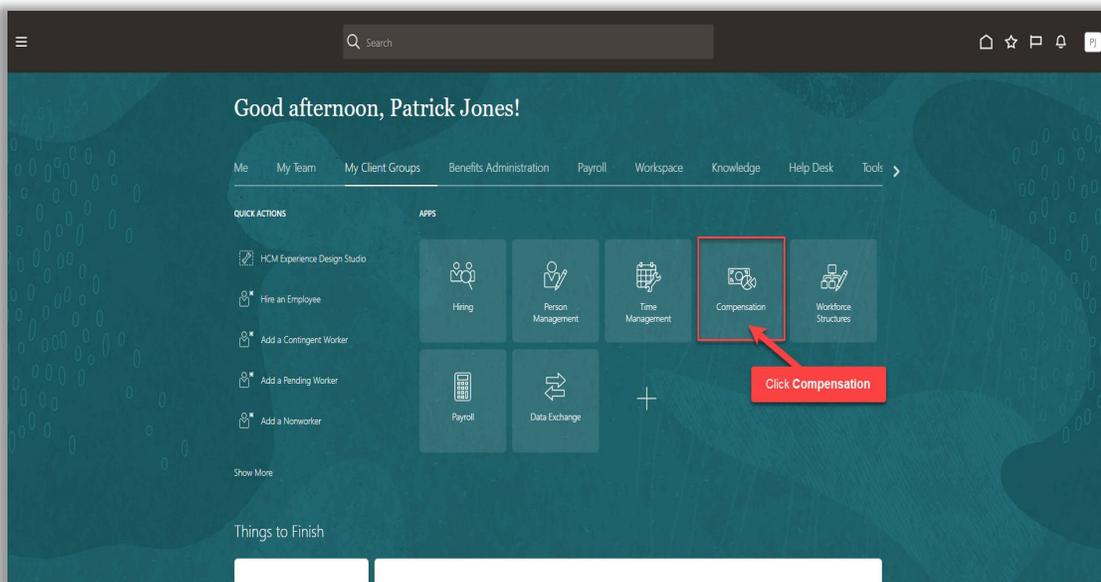
Configure Plan Components

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Compensation Components>Enter or Update Information>Save and Close

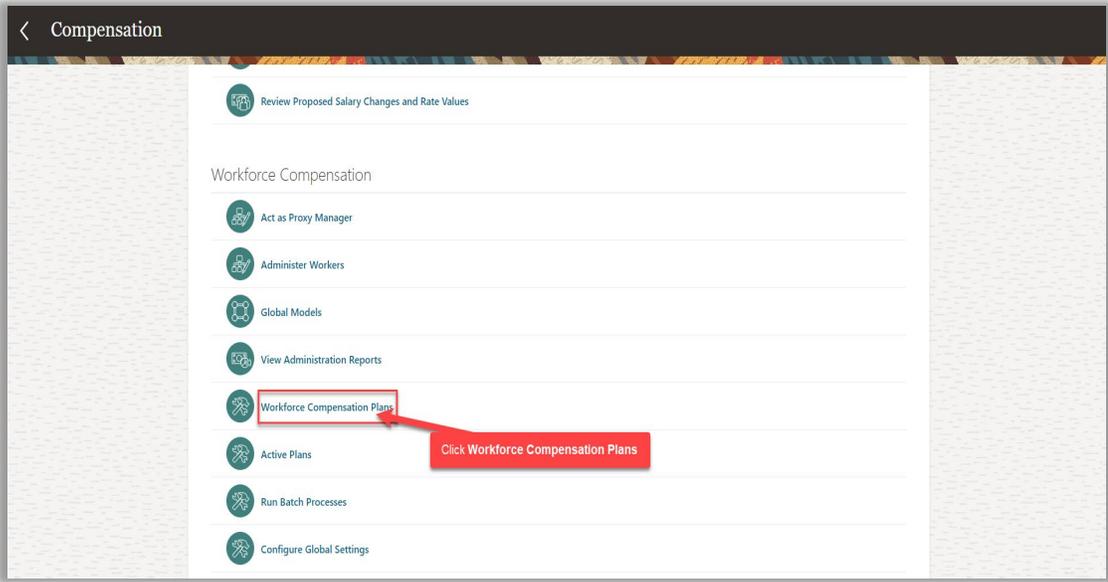
From the home screen, click **My Client Groups**



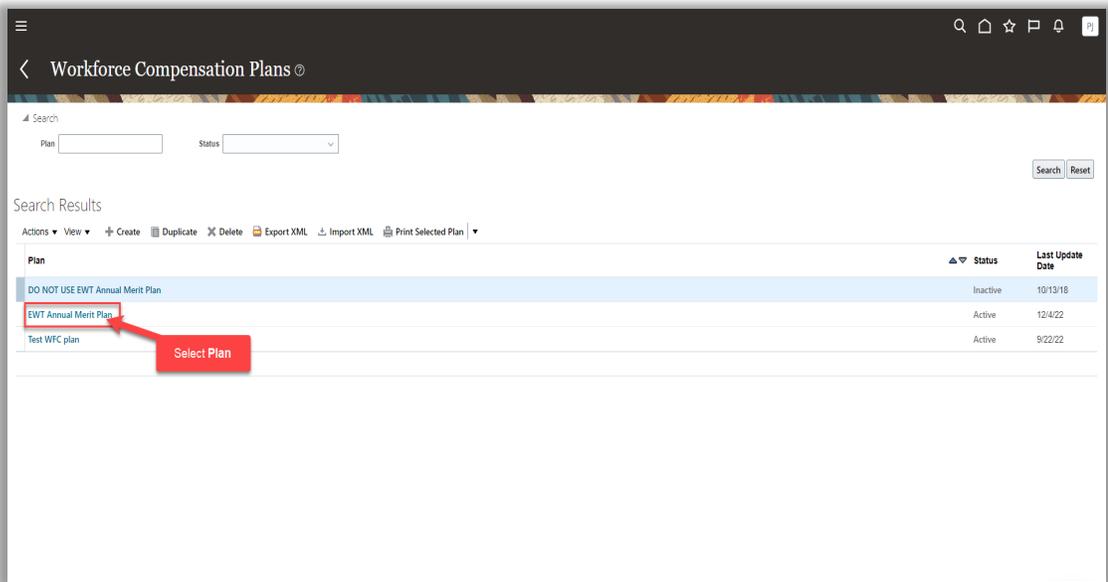
Next, click **Compensation**



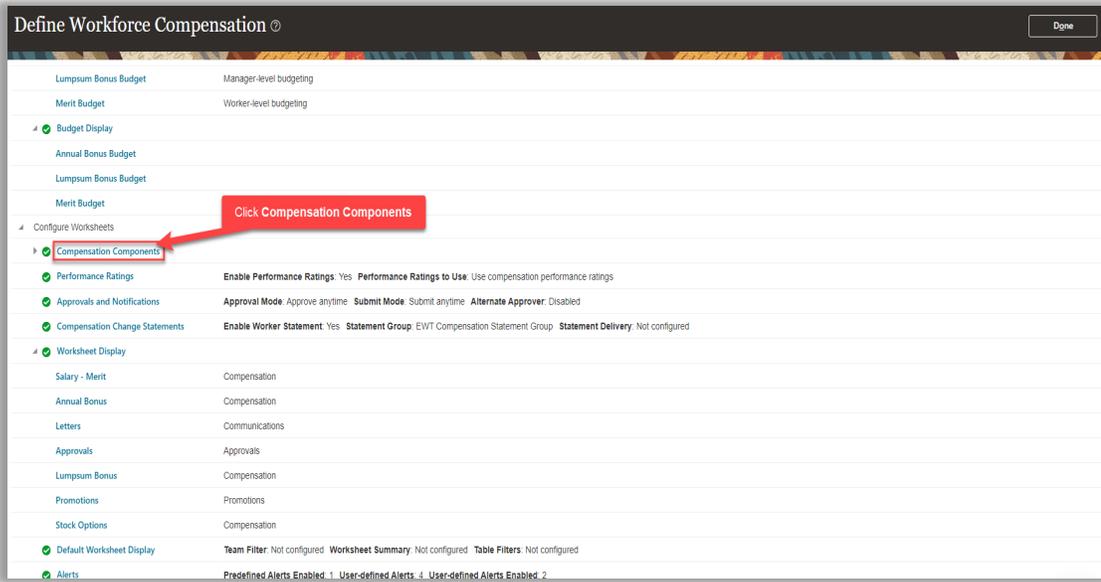
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



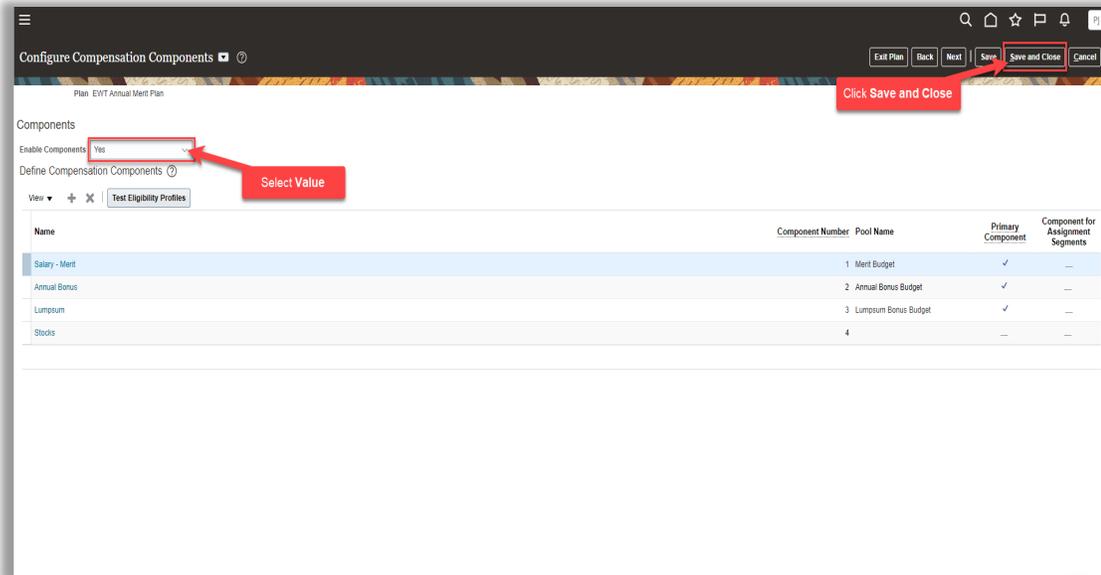
Select the Plan



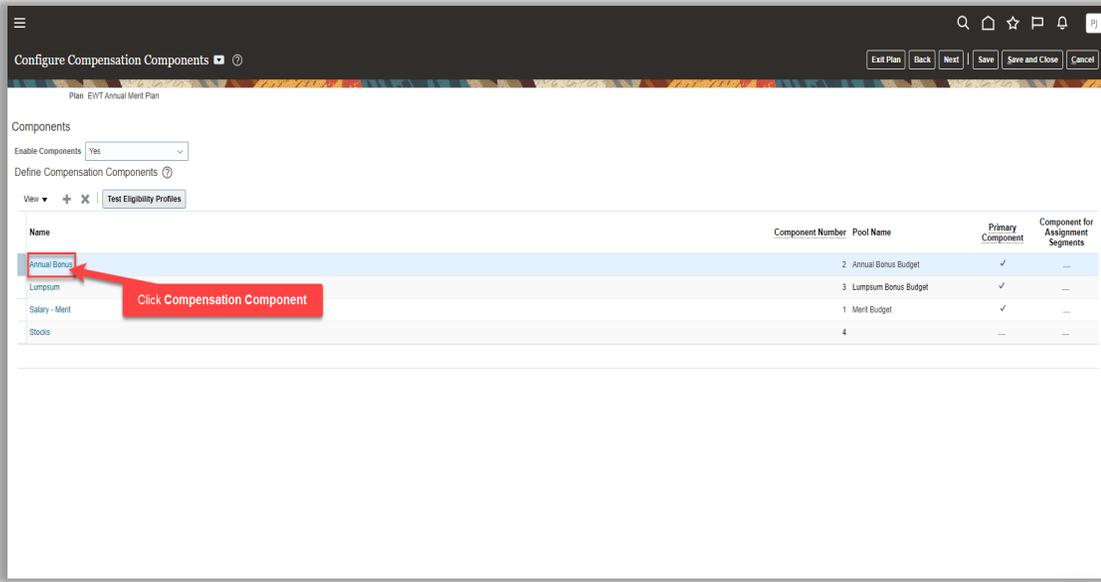
Click Compensation Components



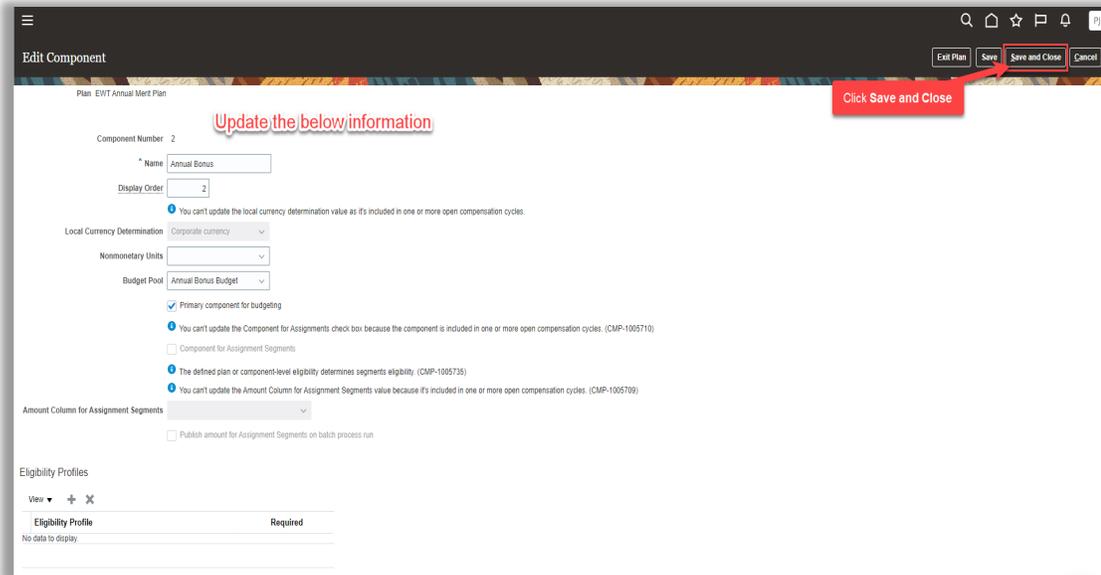
We can Enable Components from the dropdown and click Save and Close



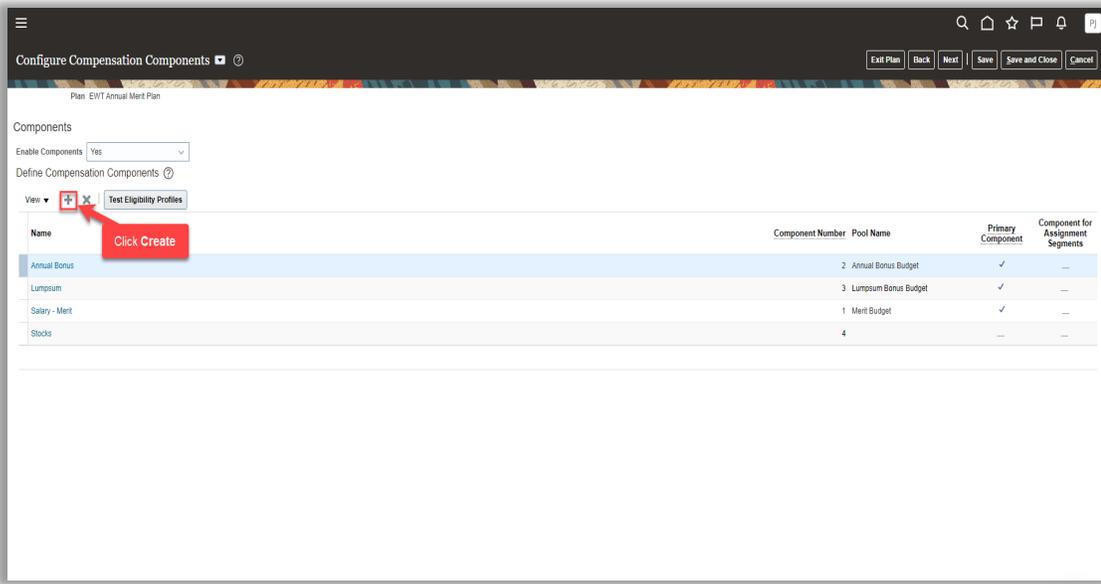
Next, we can edit an existing Compensation Component. Click the applicable Compensation Component



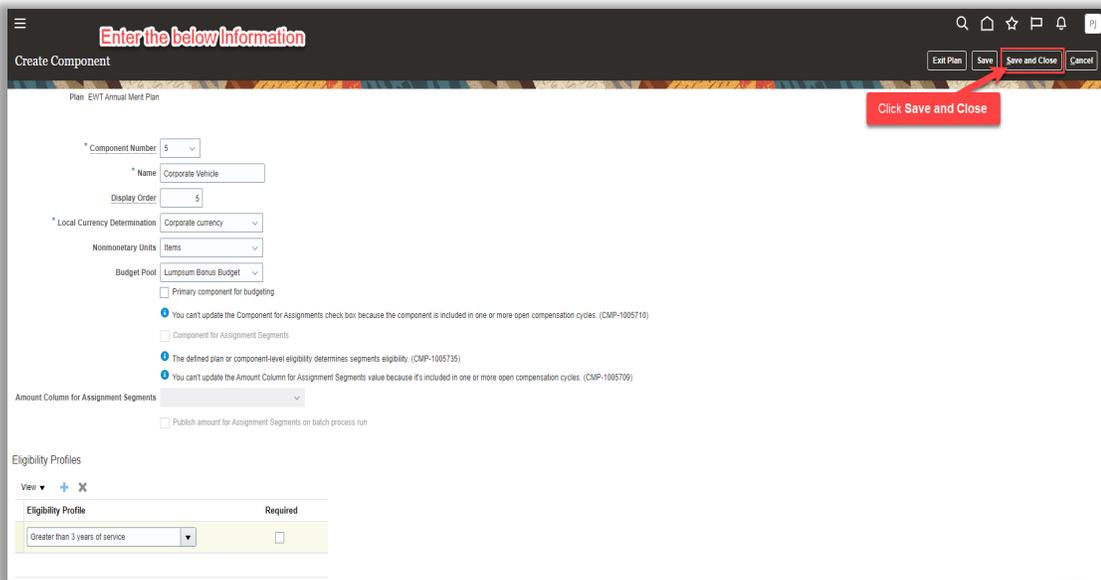
Update the applicable information and click **Save and Close**



Next, we can create a new **Compensation Component**. Click **Create**



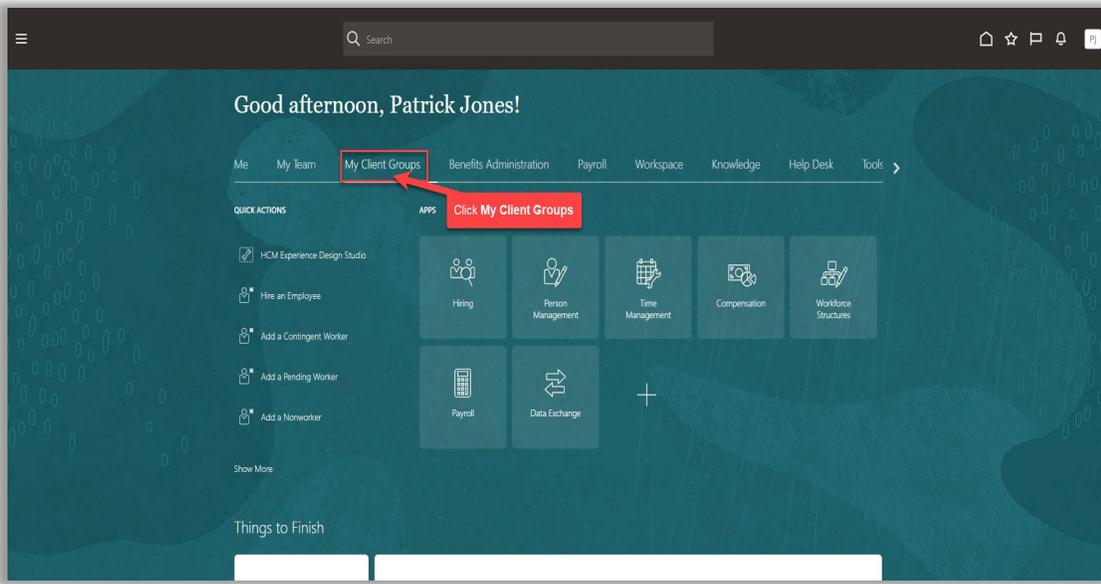
Enter the information and click **Save and Close**



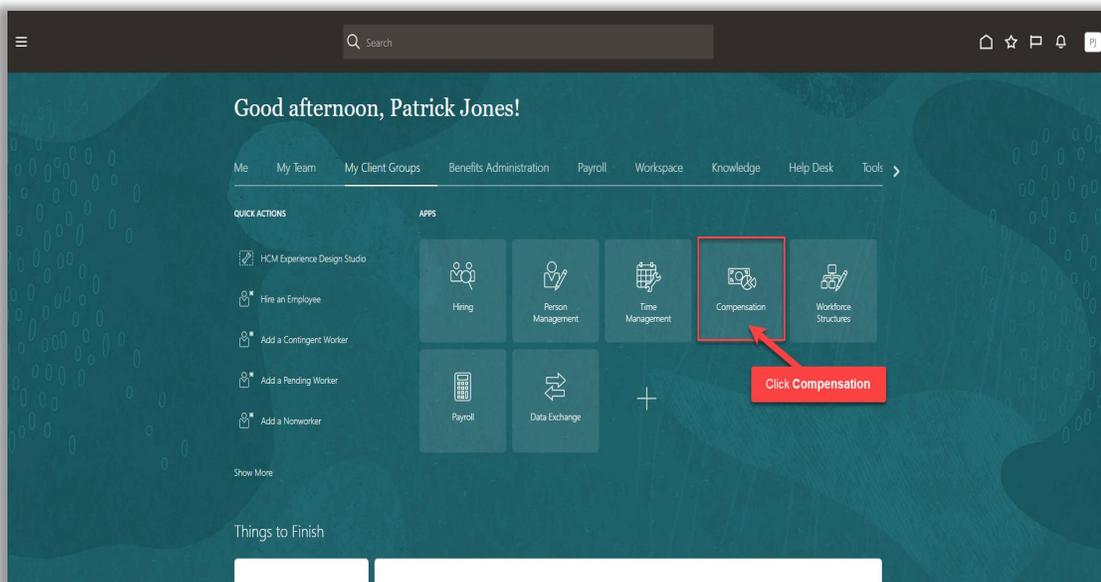
Configure Performance Ratings

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Performance Ratings>Enter or Update Information>Save and Close

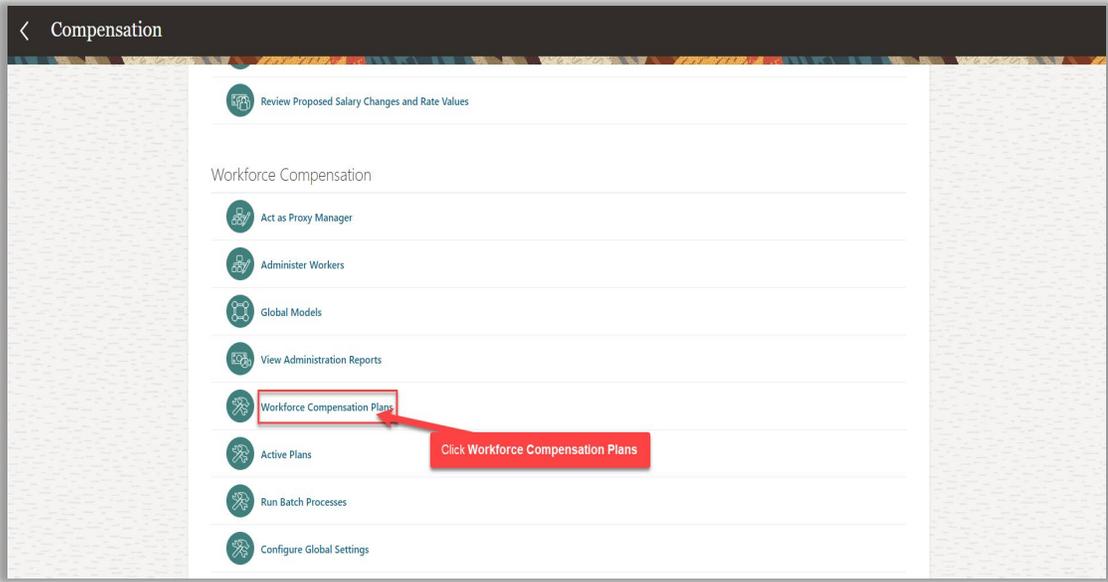
From the home screen, click **My Client Groups**



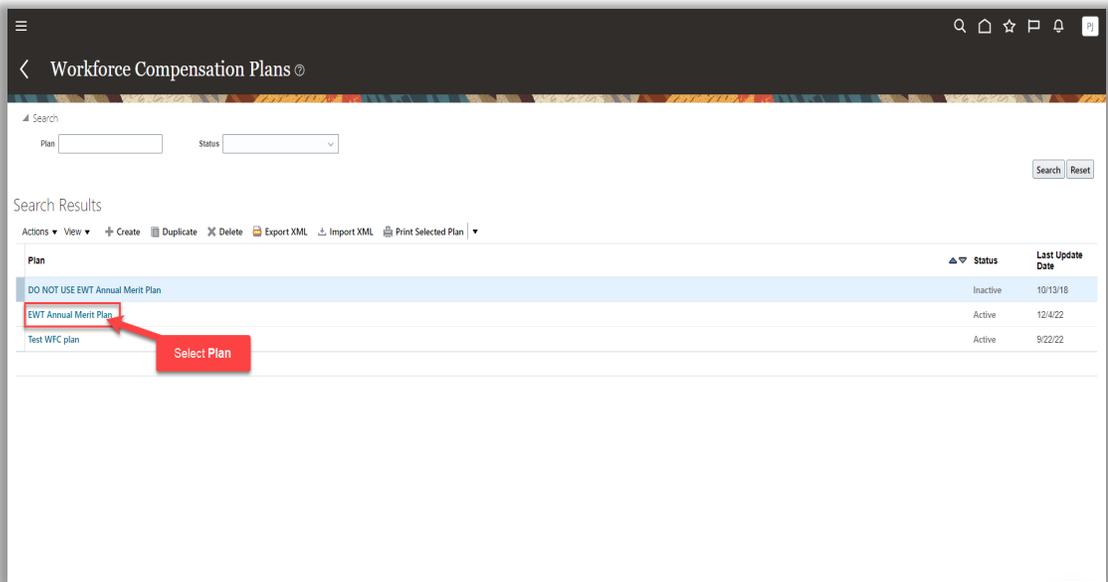
Next, click **Compensation**



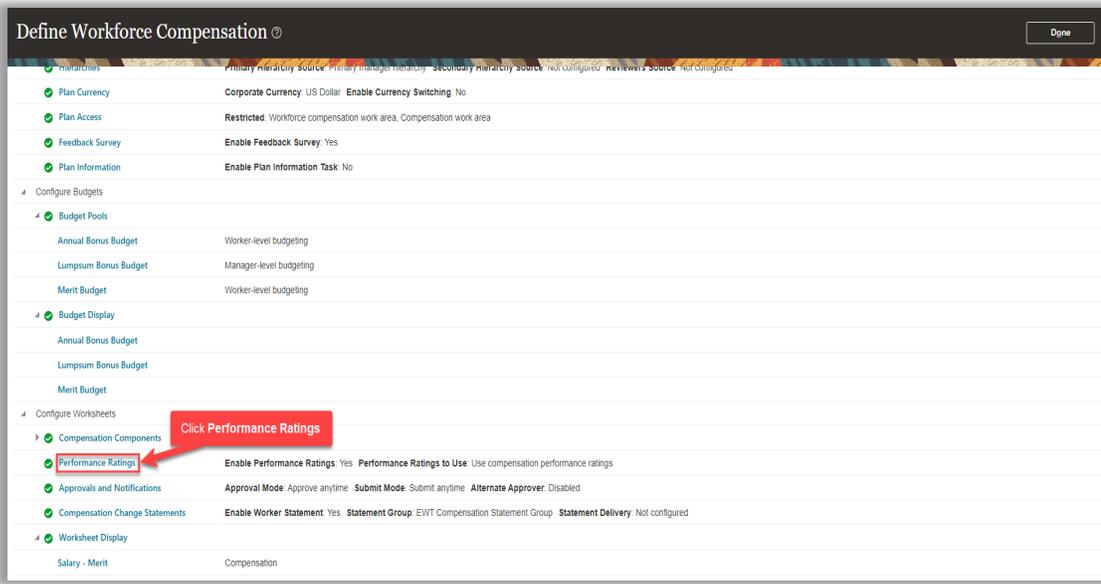
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



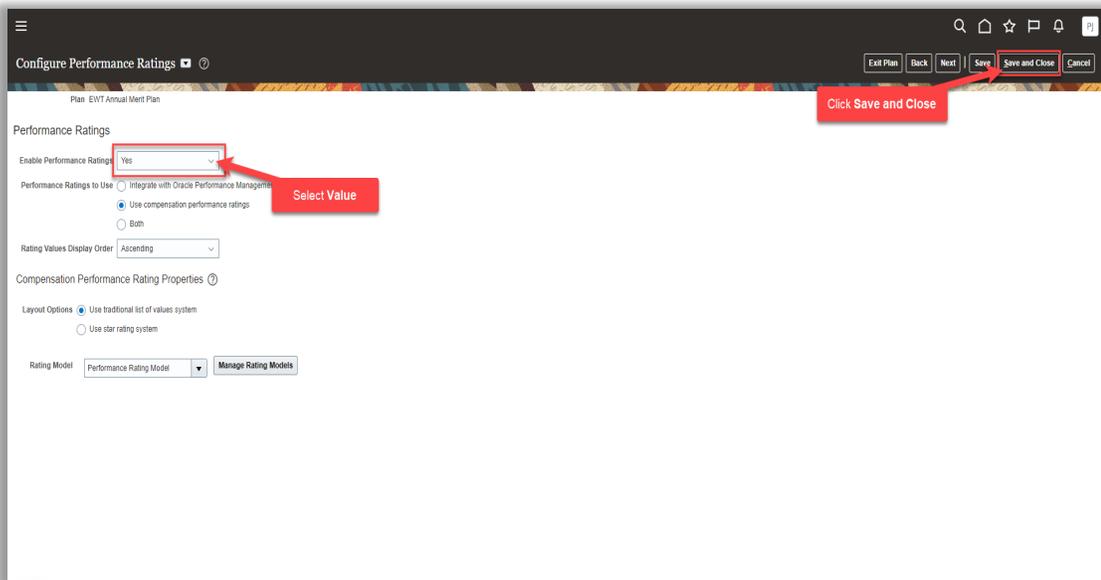
Select the Plan



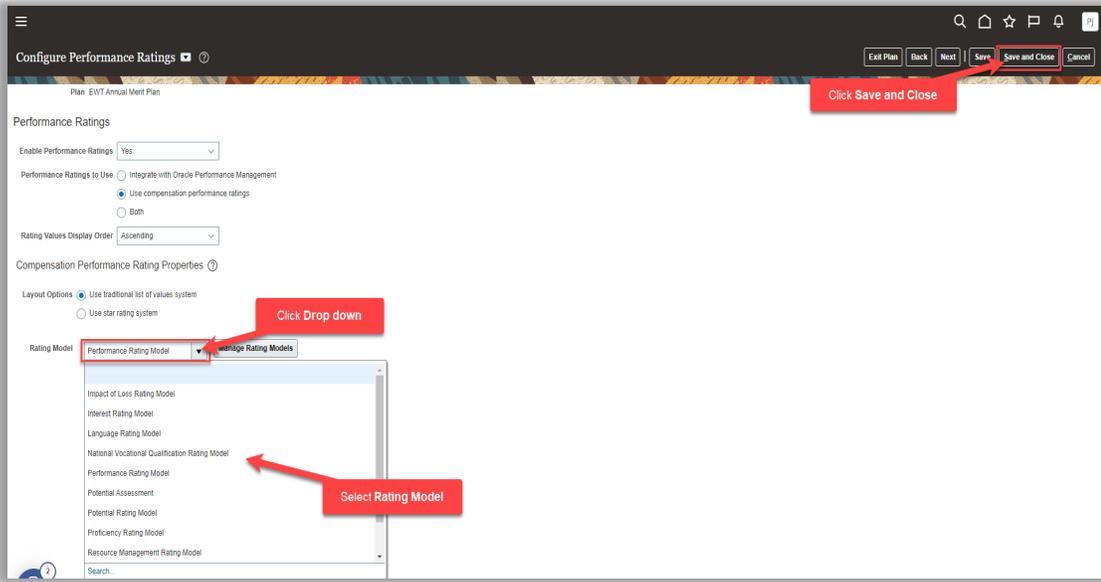
Expand Configure Worksheets and click Performance Ratings



We can Enable Performance Ratings from the dropdown and click Save and Close



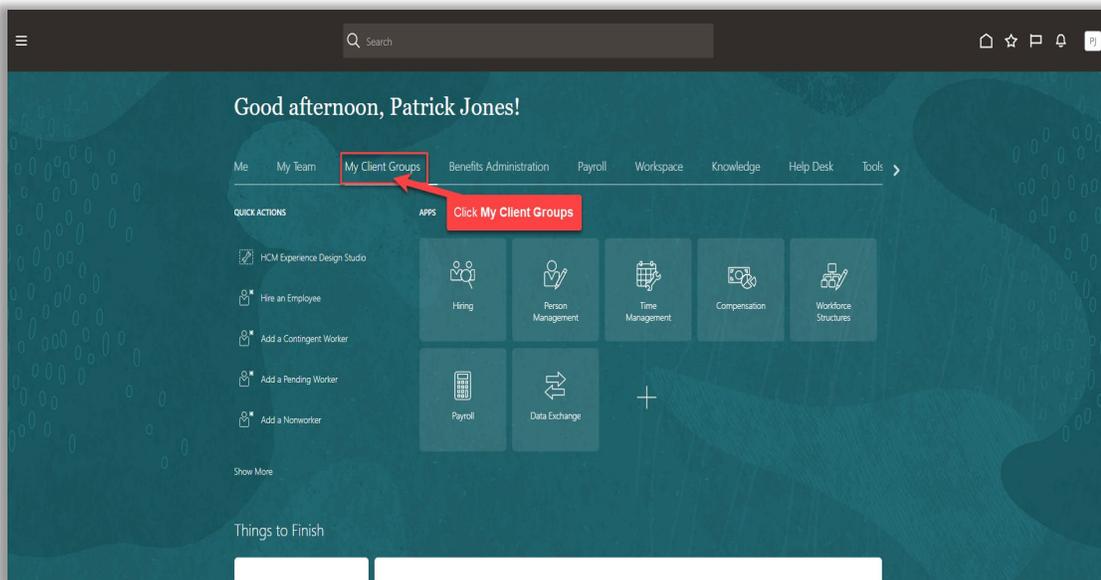
Next, we can update the Compensation Performance Rating Properties by selecting the Rating Model. Select the Rating Model and click Save and Close



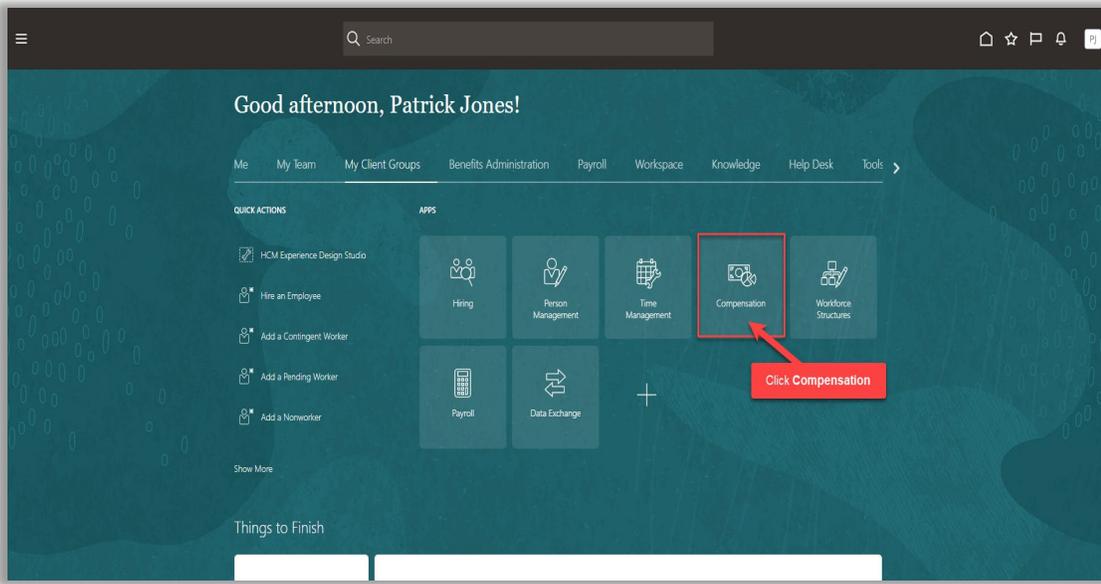
Configure Worksheet Approvals

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Approvals and Notifications>Enter or Update Information>Save and Close

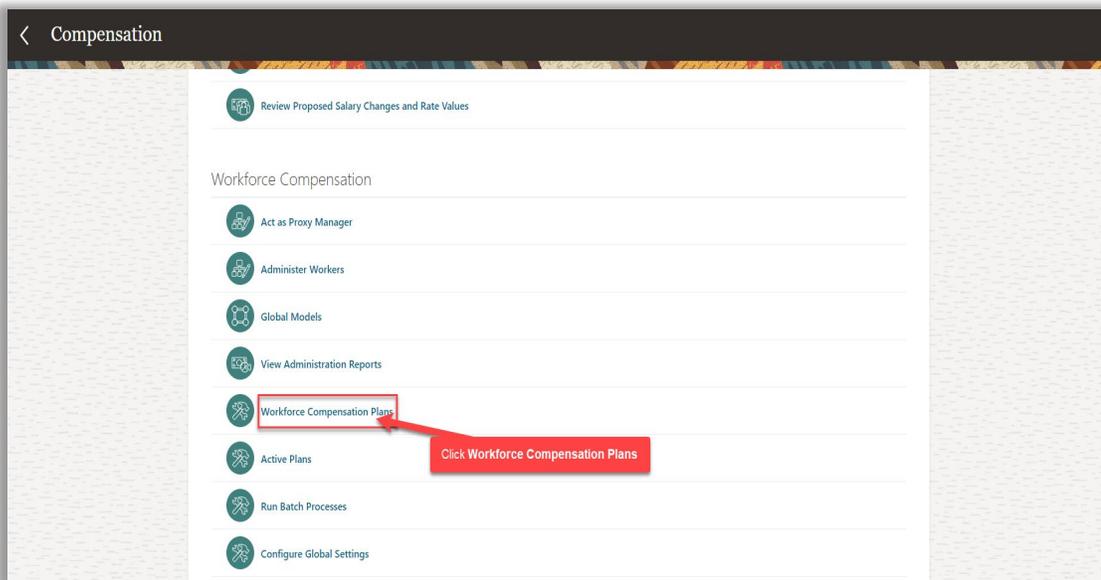
From the home screen, click **My Client Groups**



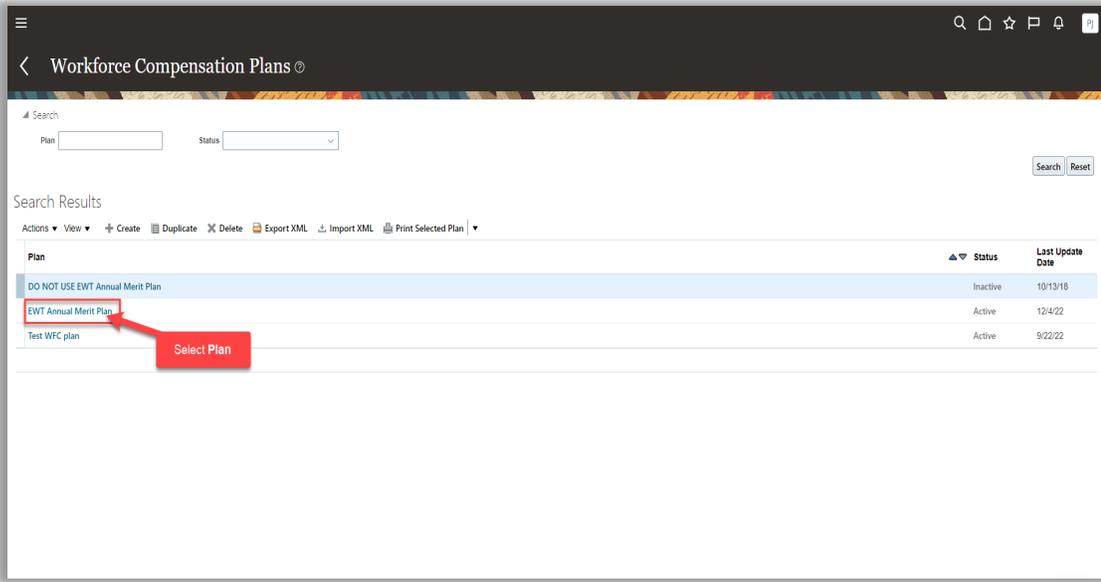
Next, click **Compensation**



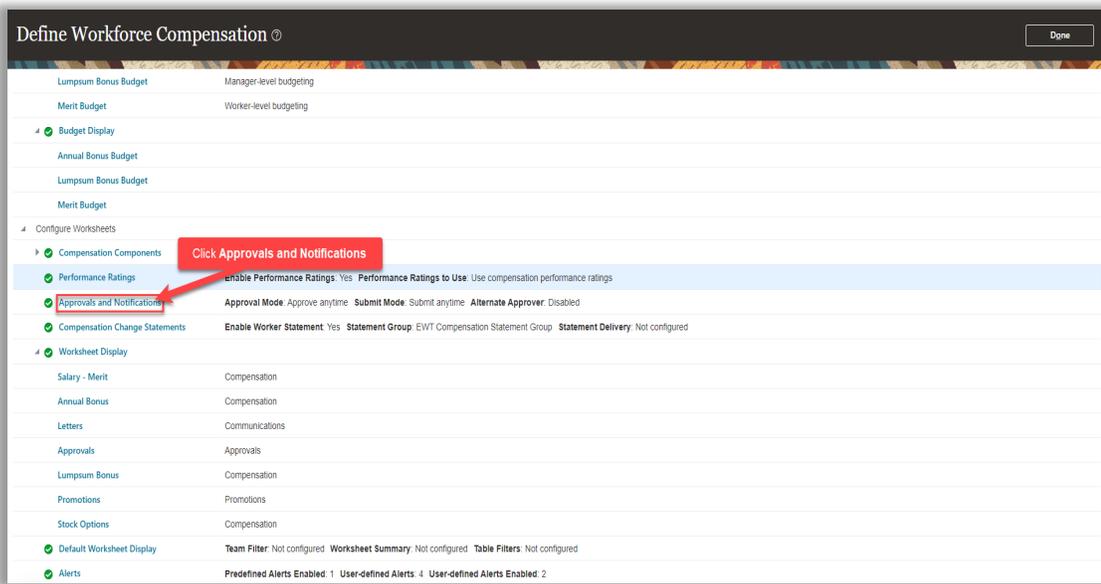
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



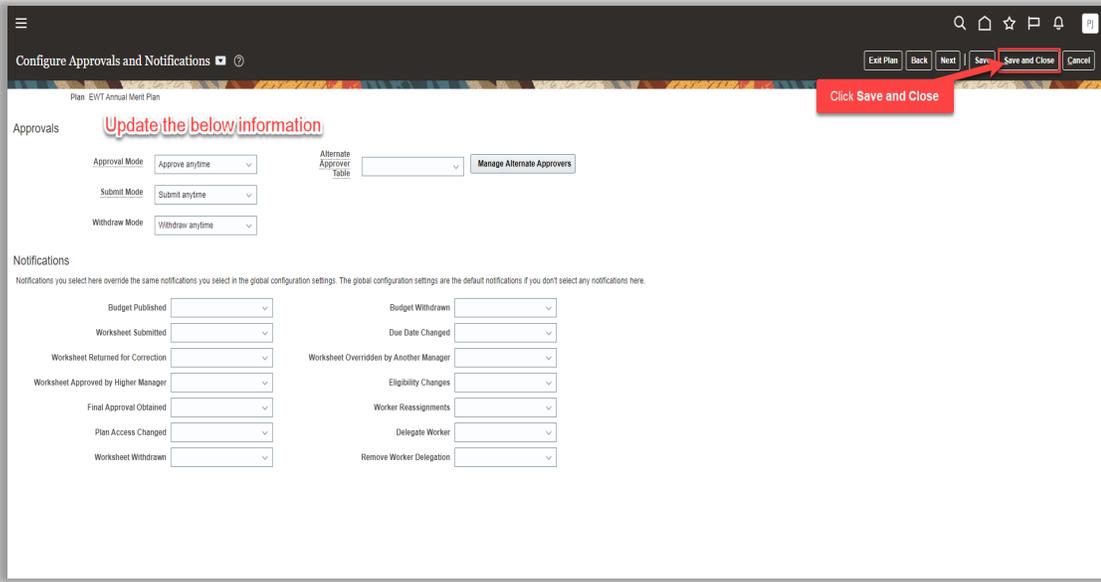
Select the Plan



Expand **Configure Worksheets** and click **Approvals and Notifications**



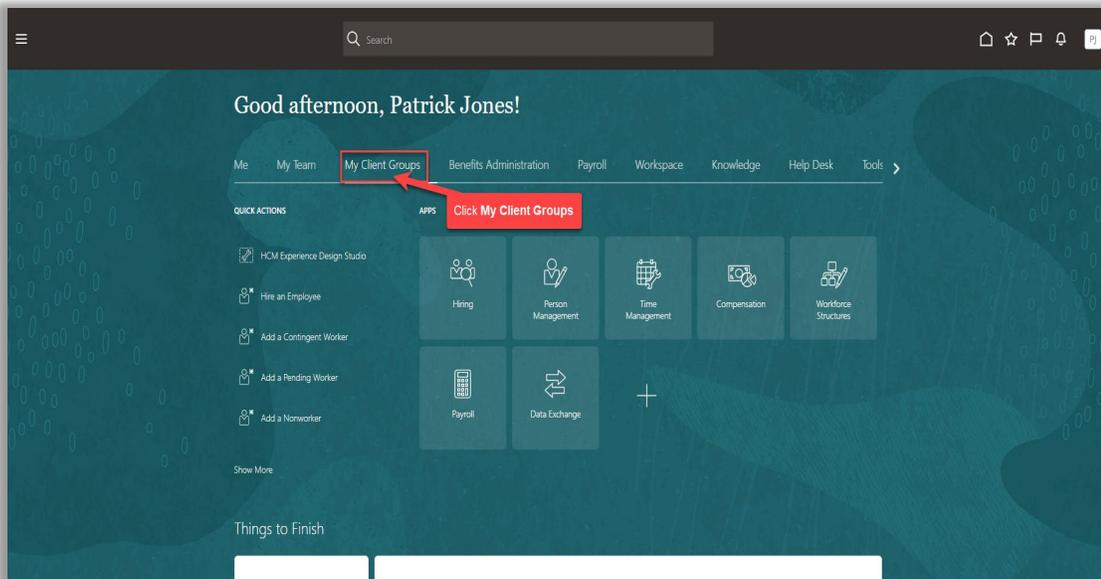
We can update the **Approvals and Notifications**. Once we've made the updates, click **Save and Close**



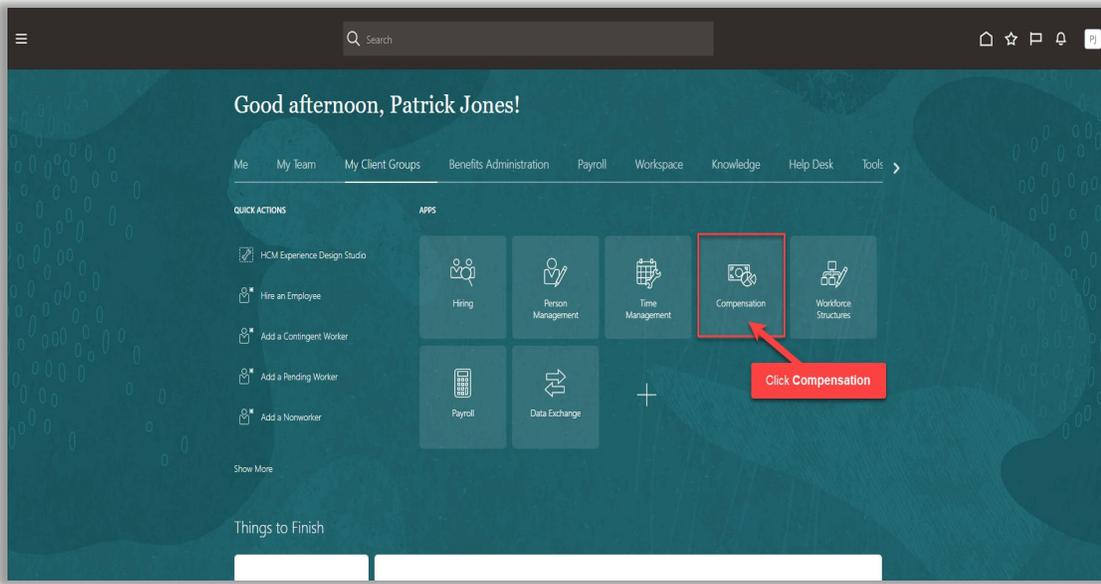
Configure Alerts In Worksheets

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Alerts>Enter or Update Information>Save and Close

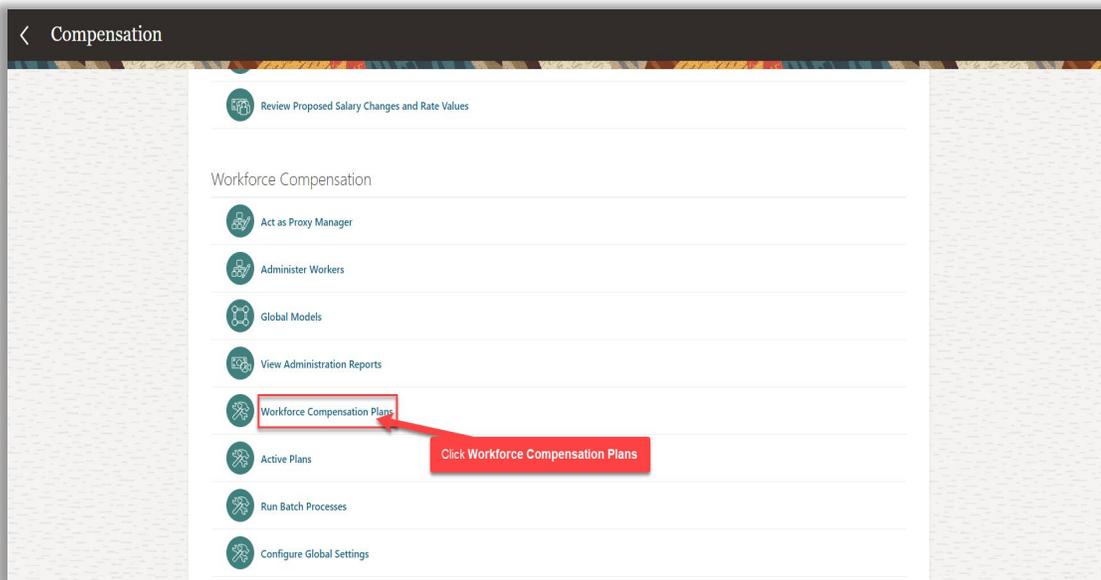
From the home screen, click **My Client Groups**



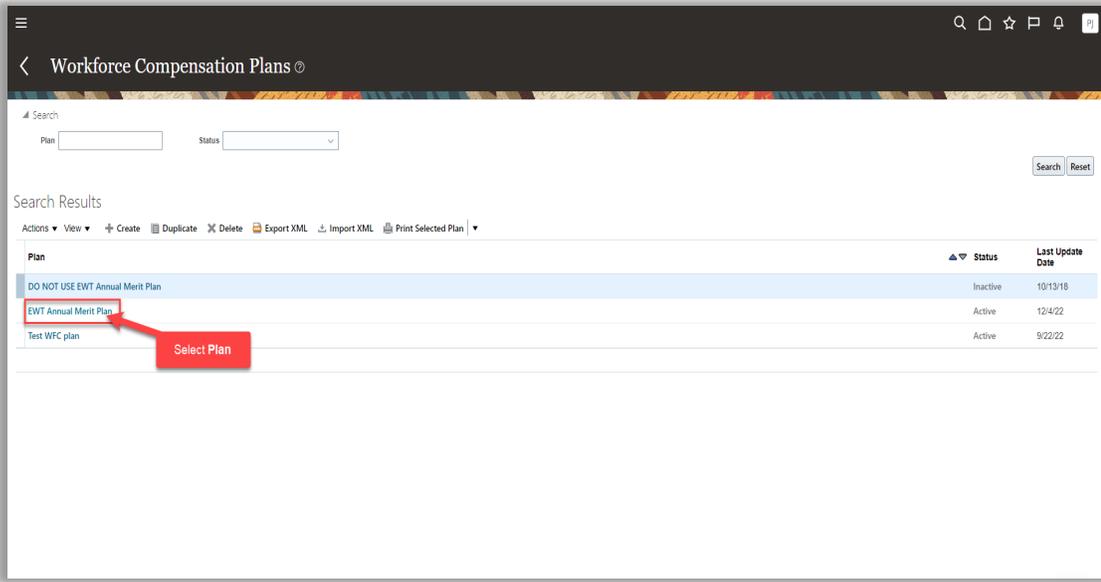
Next, click **Compensation**



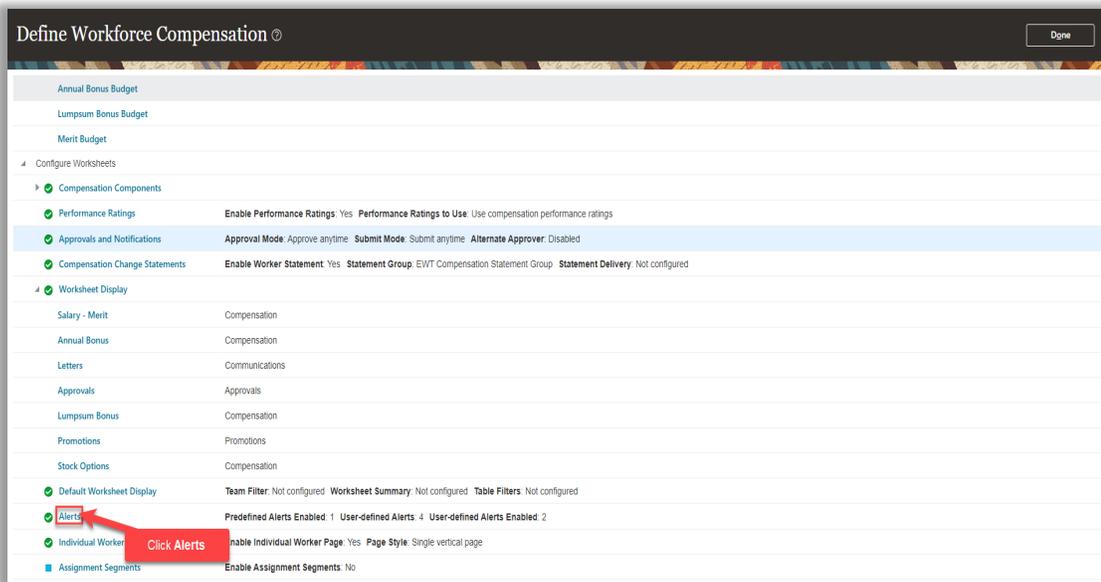
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



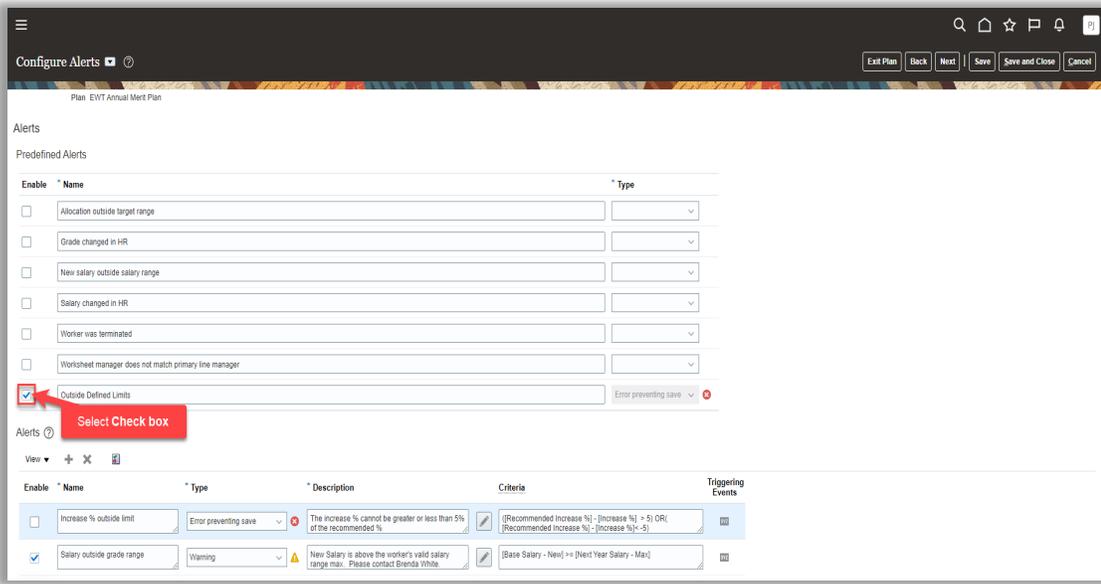
Select the Plan



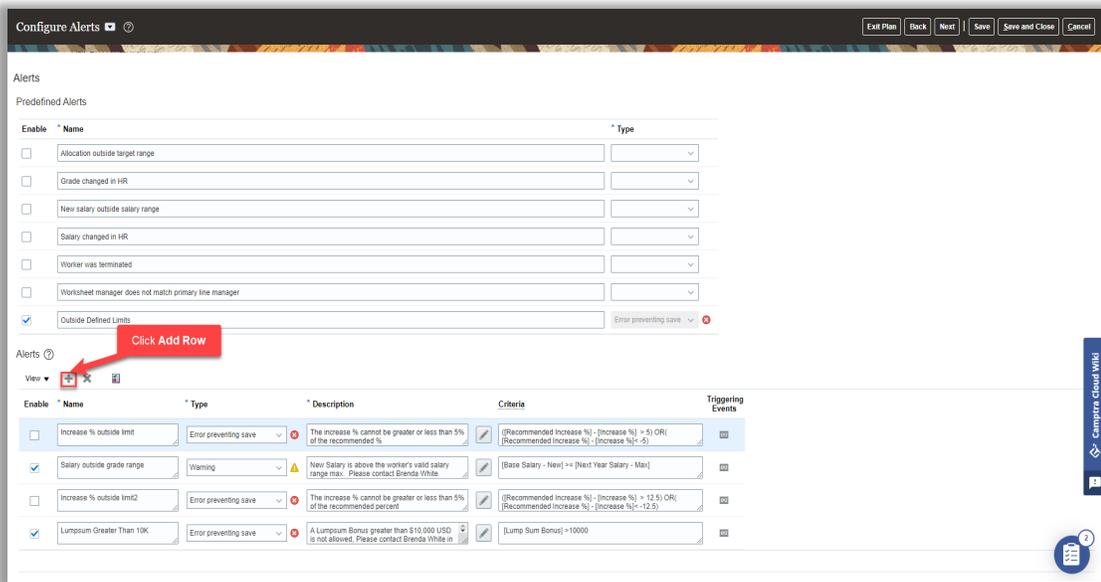
Expand **Configure Worksheets** and click **Alerts**



We can enable a **Predefined Alert** or create a custom **Alert**. To enable a **Predefined Alert**, select the **Check box**



To create a custom Alert, click Add Row



Next, enter the **Name**, **Type**, **Description**, and **Criteria**. The **Enable** check box will automatically populate. To enter the **Criteria**, click the **Pencil** to build the condition. Lastly, we can also select the **Triggering Events**

Plan: EVT Annual Merit Plan

Alerts

Predefined Alerts

Enable	Name	Type
<input type="checkbox"/>	Allocation outside target range	
<input type="checkbox"/>	Grade changed in HR	
<input type="checkbox"/>	New salary outside salary range	
<input type="checkbox"/>	Salary changed in HR	
<input type="checkbox"/>	Worker was terminated	
<input type="checkbox"/>	Worksheet manager does not match primary line manager	
<input checked="" type="checkbox"/>	Outside Defined Limits	Error preventing save

Alerts

View: + X

Enter the below information

Enable	Name	Type	Description	Criteria	Triggering Events
<input checked="" type="checkbox"/>	Sample	Warning medium	Sample		
<input type="checkbox"/>	Increase % outside limit	Error preventing save	The increase % cannot be greater or less than 5% of the recommended %	(Recommended increase % - Increase %) > 5 OR (Recommended increase % - Increase %) < -5	
<input checked="" type="checkbox"/>	Salary outside grade range	Warning	New Salary is above the worker's valid salary range max. Please contact Brenda White	[Base Salary - New] = [Next Year Salary - Max]	
<input type="checkbox"/>	Increase % outside limit2	Error preventing save	The increase % cannot be greater or less than 5% of the recommended percent	(Recommended increase % - Increase %) > 12.5 OR (Recommended increase % - Increase %) < -12.5	
<input checked="" type="checkbox"/>	Lumpsum Greater Than 10K	Error preventing save	A Lumpsum Bonus greater than \$10,000 USD is not allowed. Please contact Brenda White in	[Lump Sum Bonus] > 10000	

Once the information is added, click **Save and Close**

Plan: EVT Annual Merit Plan

Configure Alerts

Exit Plan | Back | Next | Save | **Save and Close** | Cancel

Click Save and Close

Alerts

Predefined Alerts

Enable	Name	Type
<input type="checkbox"/>	Allocation outside target range	
<input type="checkbox"/>	Grade changed in HR	
<input type="checkbox"/>	New salary outside salary range	
<input type="checkbox"/>	Salary changed in HR	
<input type="checkbox"/>	Worker was terminated	
<input type="checkbox"/>	Worksheet manager does not match primary line manager	
<input checked="" type="checkbox"/>	Outside Defined Limits	Error preventing save

Alerts

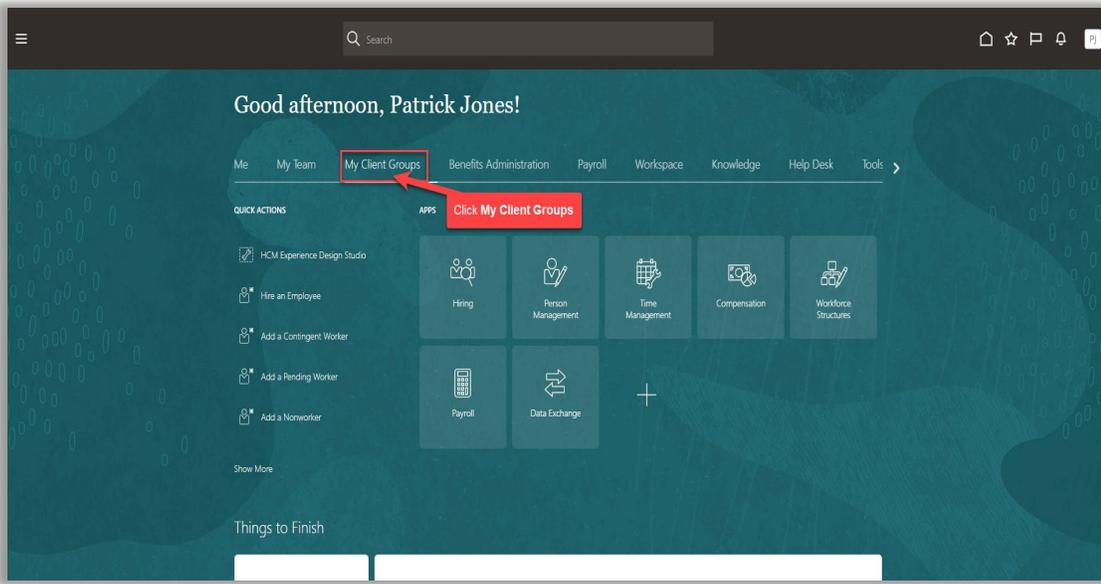
View: + X

Enable	Name	Type	Description	Criteria	Triggering Events
<input checked="" type="checkbox"/>	Sample	Warning medium	Sample		
<input type="checkbox"/>	Increase % outside limit	Error preventing save	The increase % cannot be greater or less than 5% of the recommended %	(Recommended increase % - Increase %) > 5 OR (Recommended increase % - Increase %) < -5	
<input checked="" type="checkbox"/>	Salary outside grade range	Warning	New Salary is above the worker's valid salary range max. Please contact Brenda White	[Base Salary - New] = [Next Year Salary - Max]	
<input type="checkbox"/>	Increase % outside limit2	Error preventing save	The increase % cannot be greater or less than 5% of the recommended percent	(Recommended increase % - Increase %) > 12.5 OR (Recommended increase % - Increase %) < -12.5	

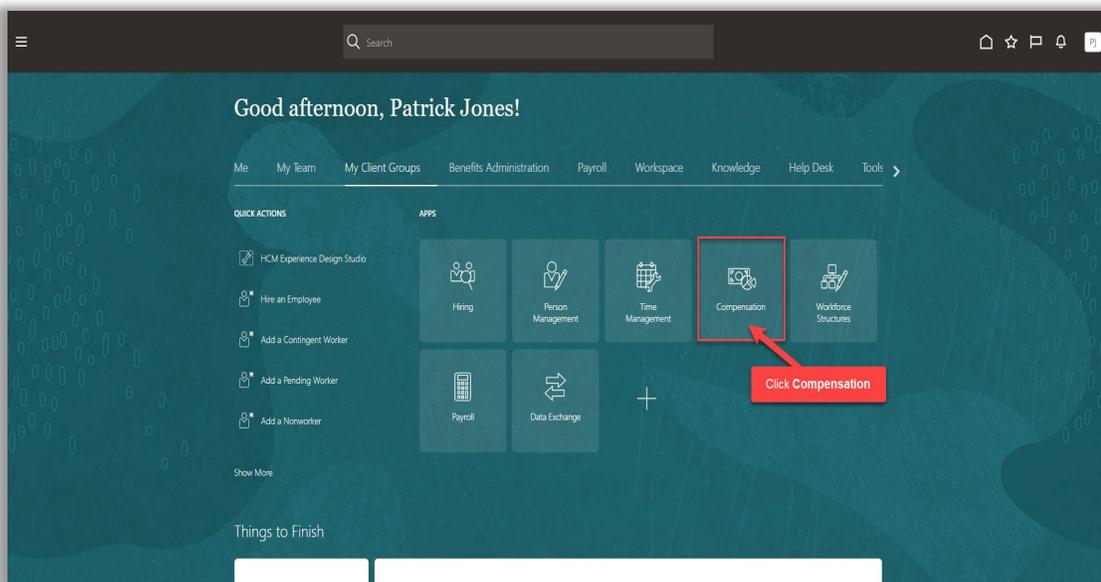
Add A New Field To A Compensation Worksheet

Navigation: Home > My Client Groups > Compensation > Workforce Compensation Plans > Select Plan > Worksheet Display > Enter or Update Information > Save and Close

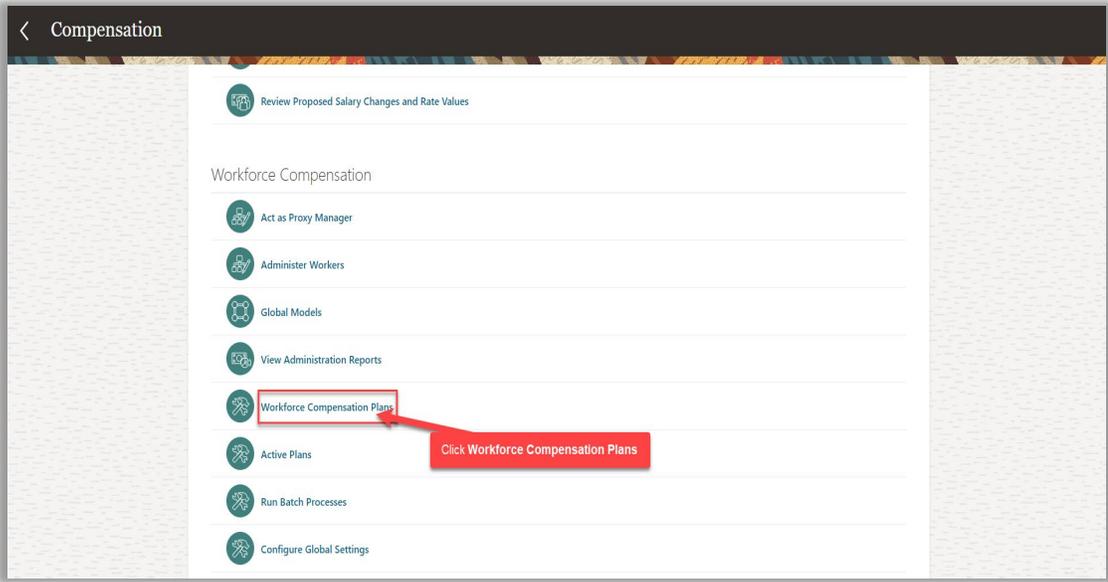
From the home screen, click **My Client Groups**



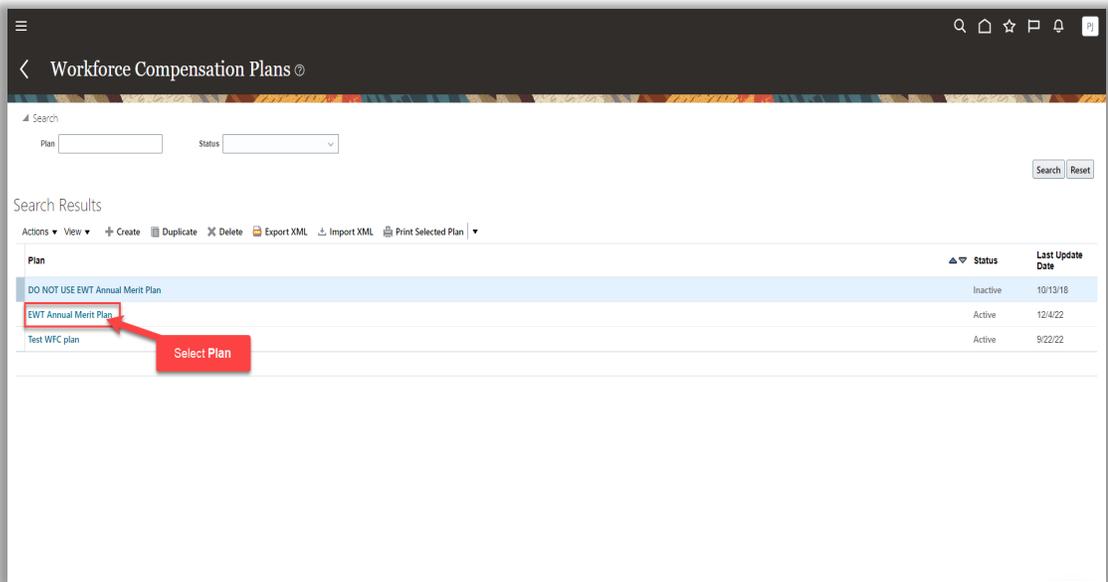
Next, click **Compensation**



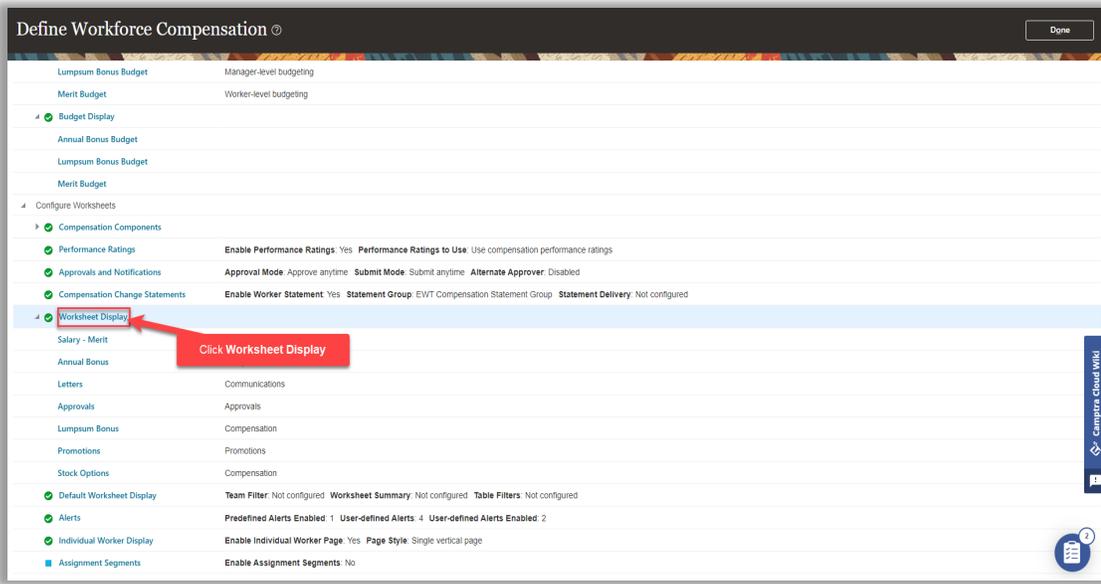
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



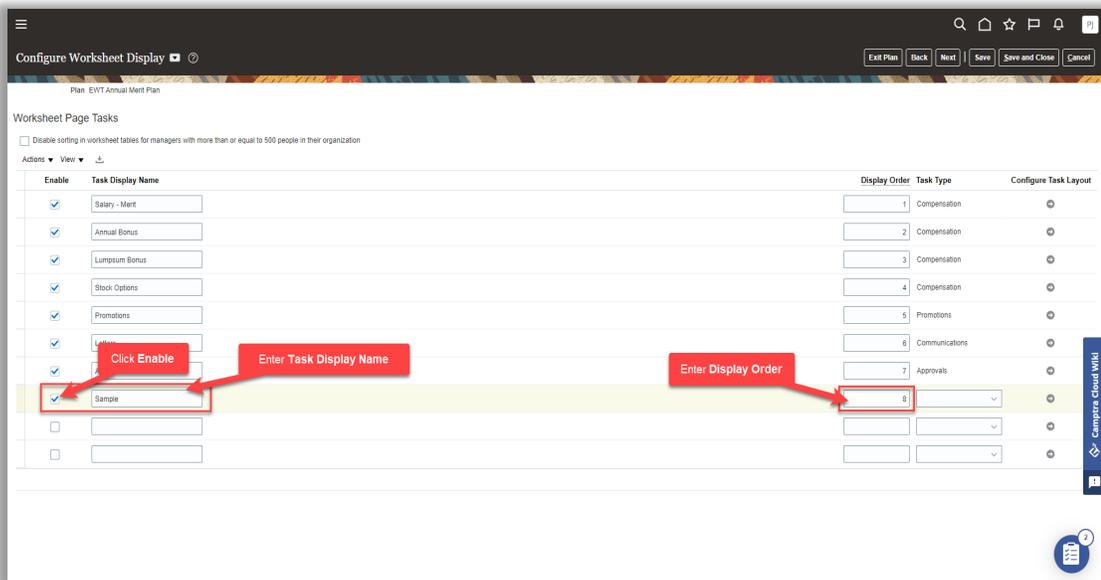
Select the Plan



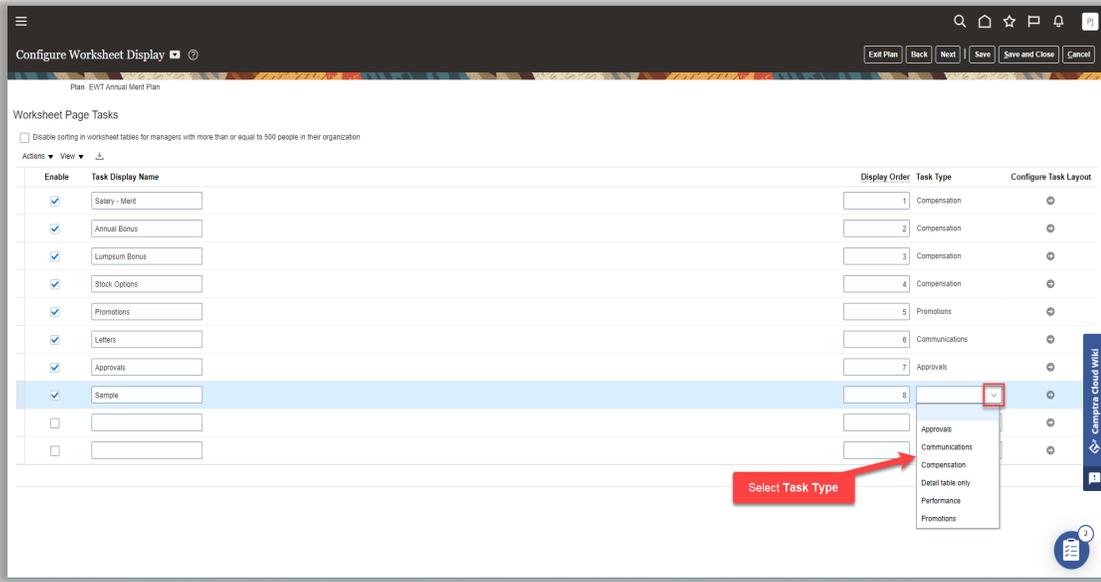
Expand Configure Worksheets and click Worksheet Display



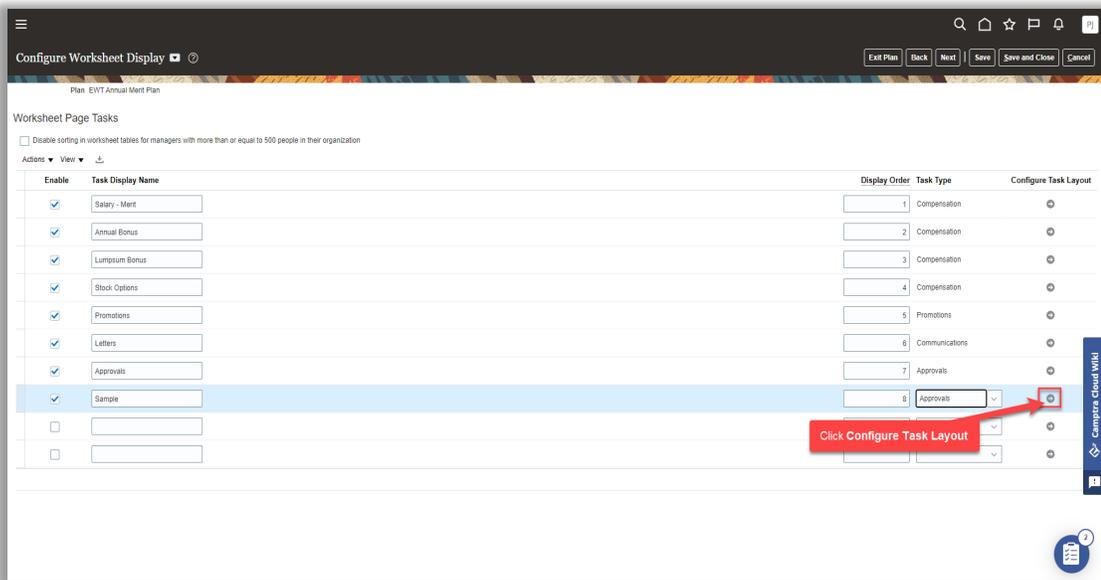
Enter the **Task Display Name** and click **Enable**. Next, enter the **Display Order**



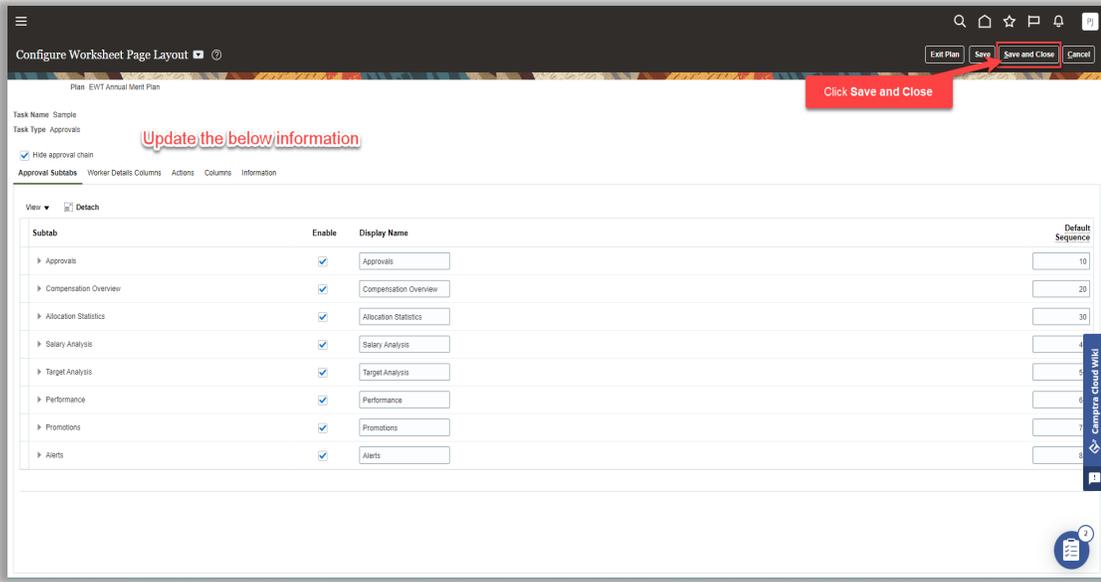
Next, select the **Task Type** from the dropdown



Next, click **Configure Task Layout**



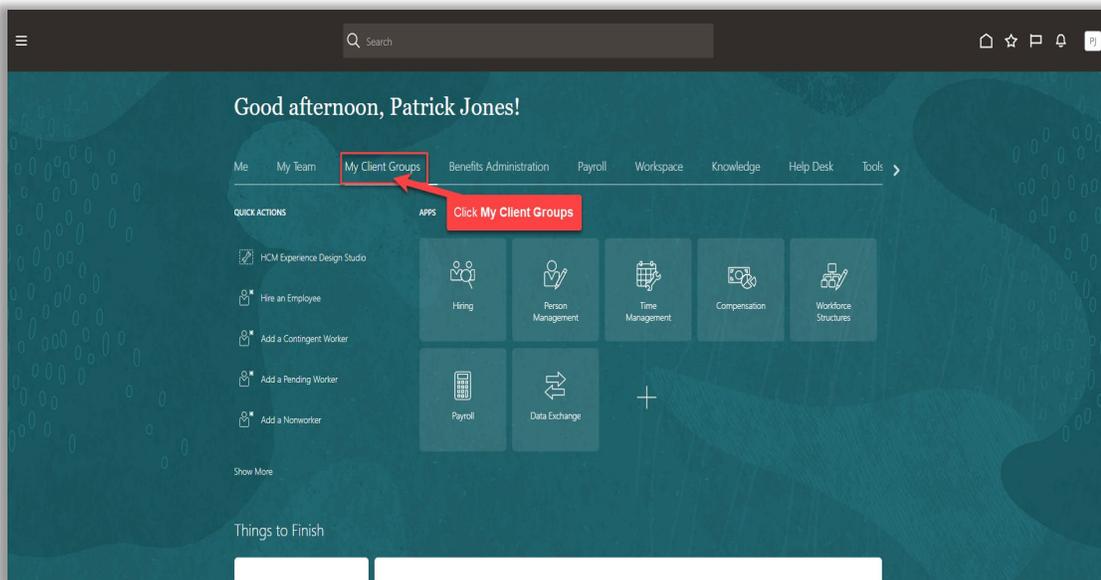
Here we can **Configure Worksheet Page Layout**. Once complete, click **Save and Close**



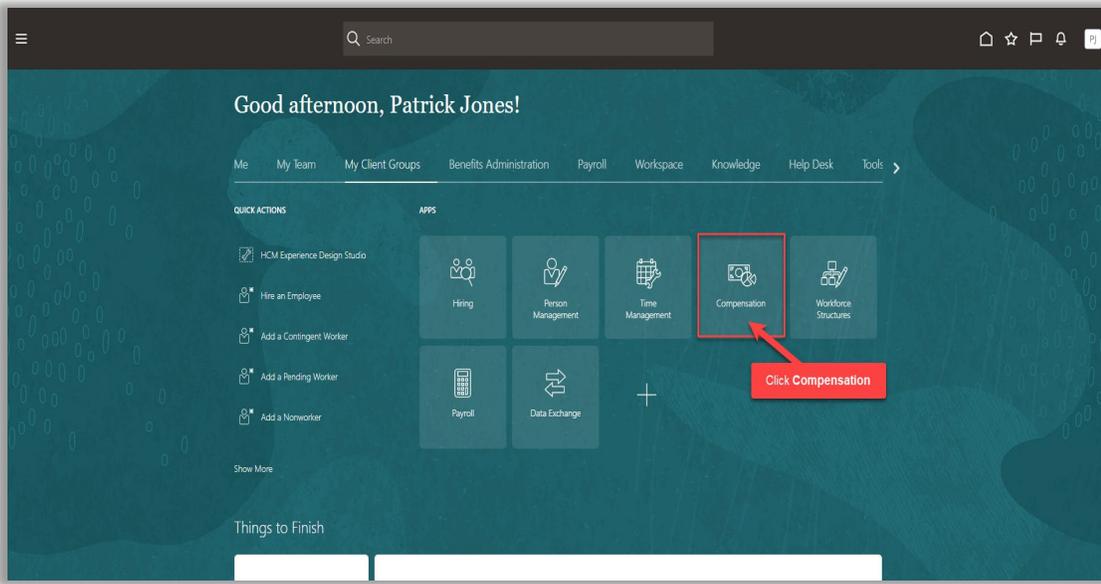
Configure Individual Worker Display

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Individual Worker Display>Enter or Update Information>Save and Close

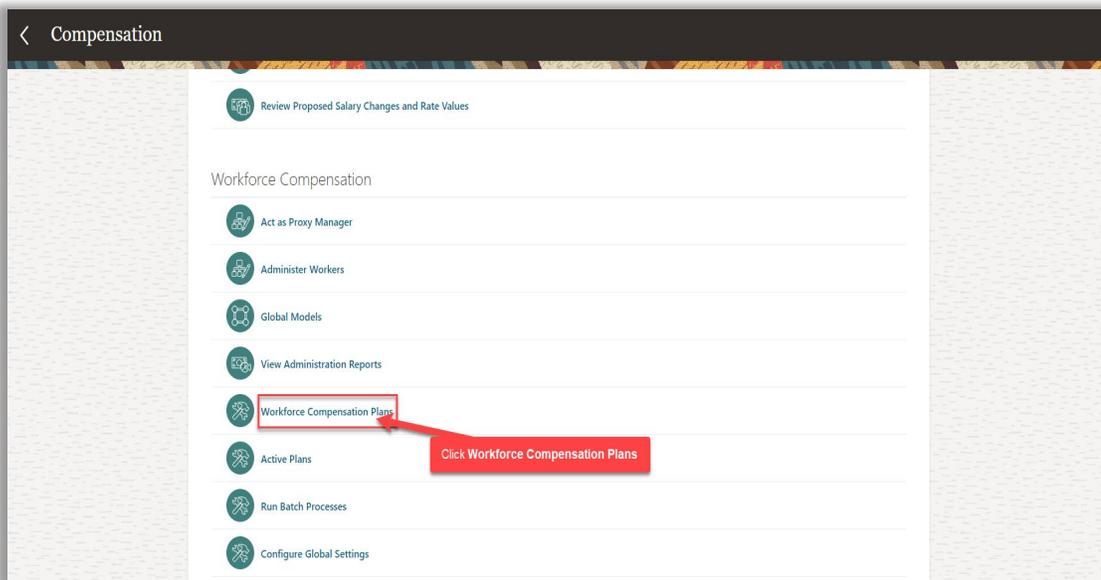
From the home screen, click **My Client Groups**



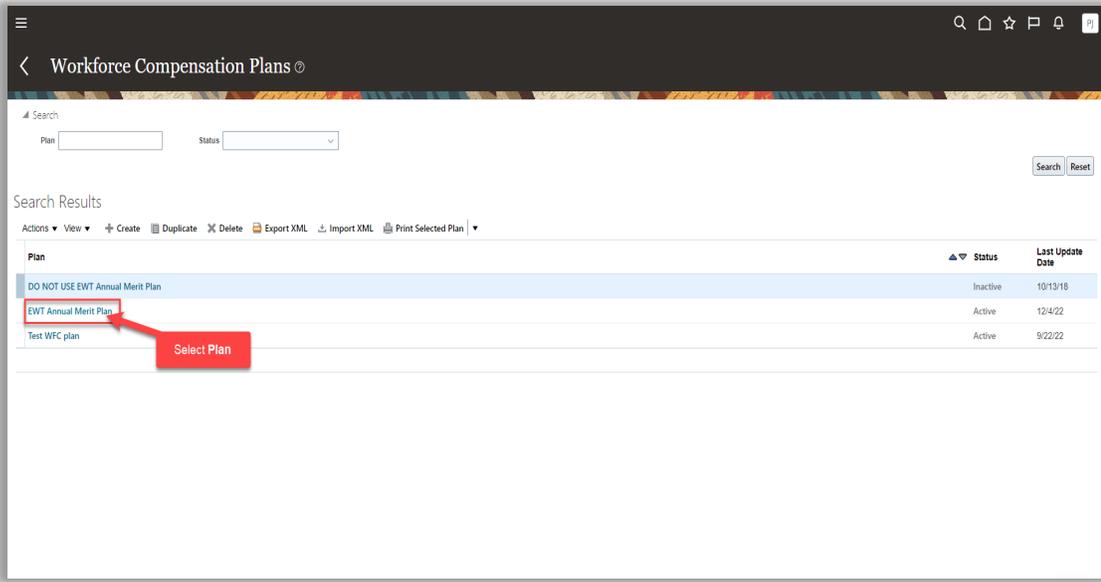
Next, click **Compensation**



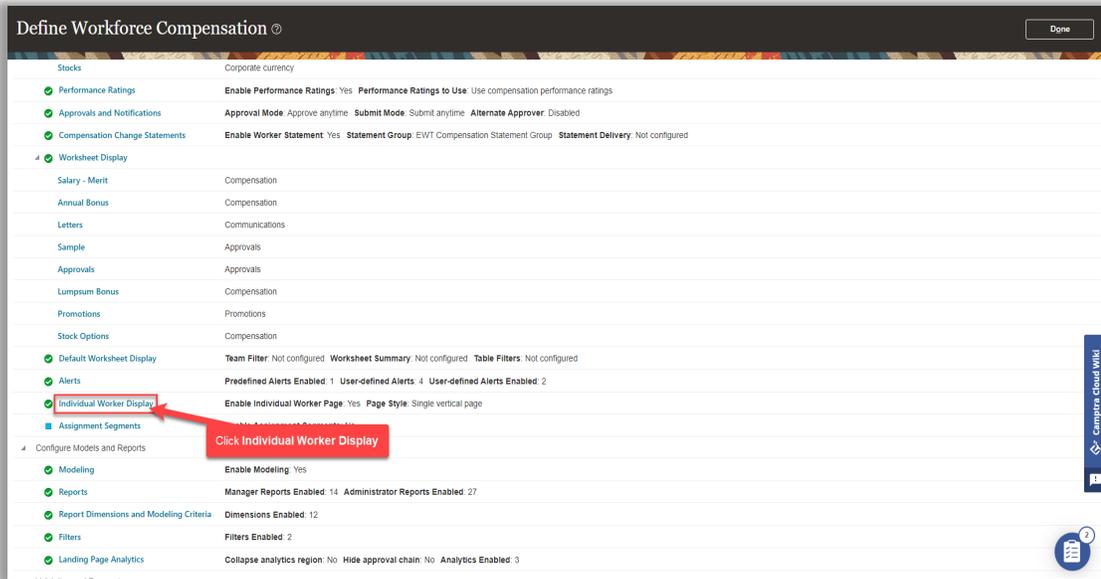
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



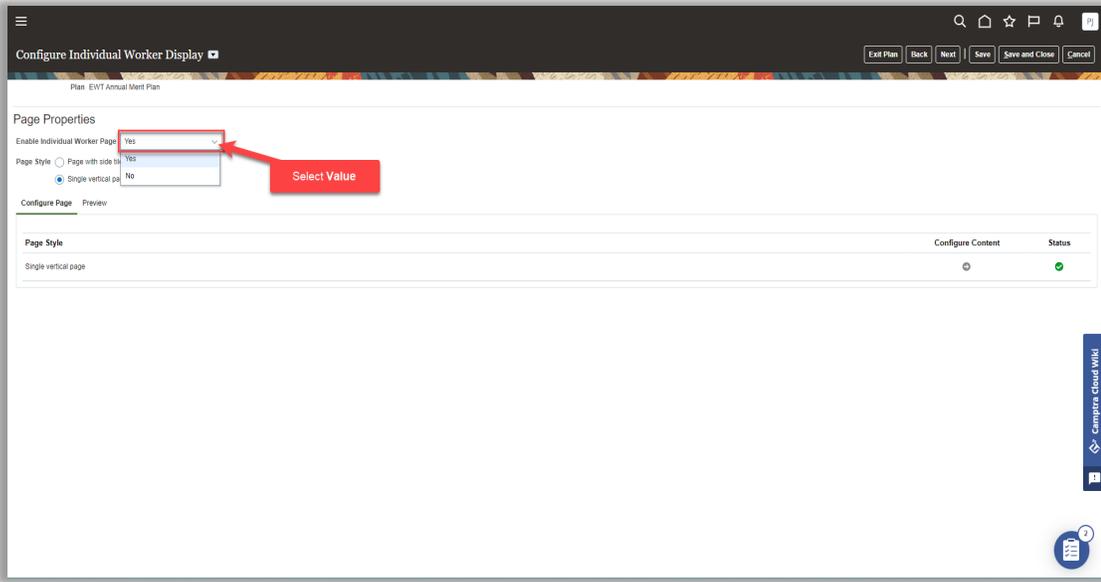
Select the Plan



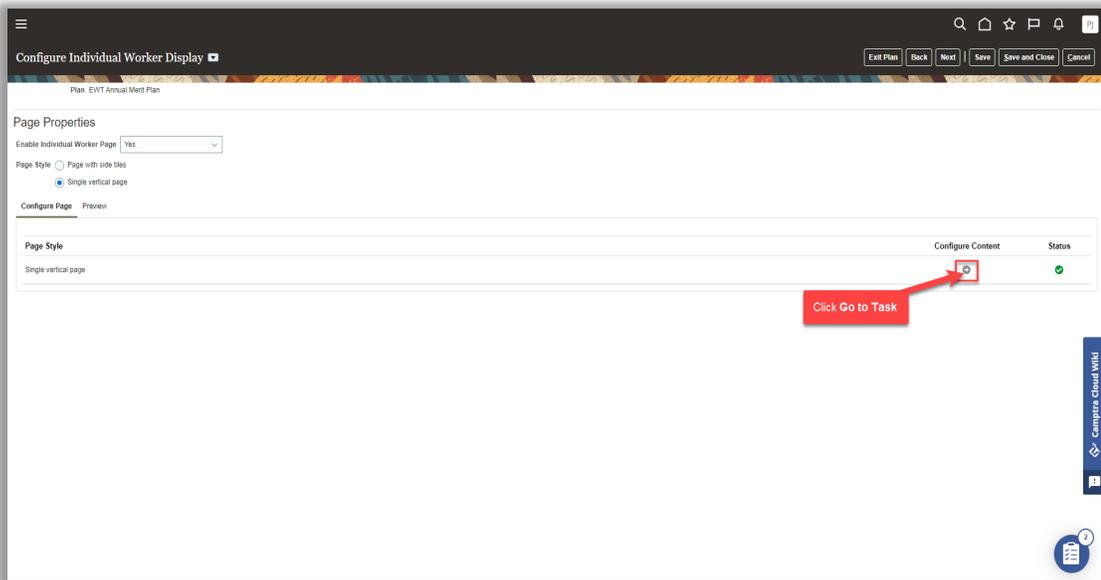
Expand **Configure Worksheets** and click **Individual Worker Display**



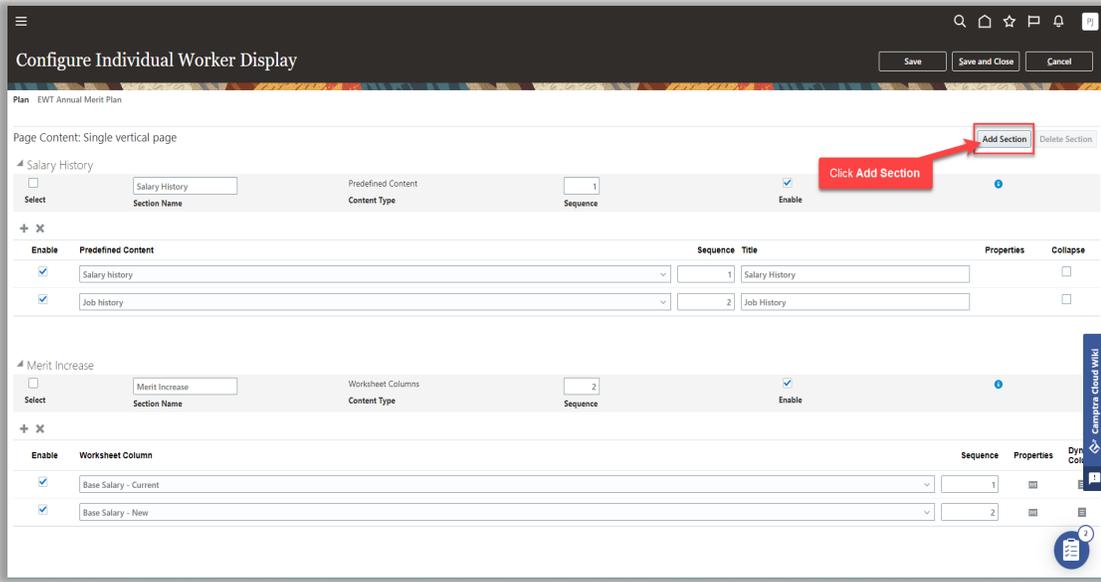
We can **Enable Individual Worker Page** from the dropdown



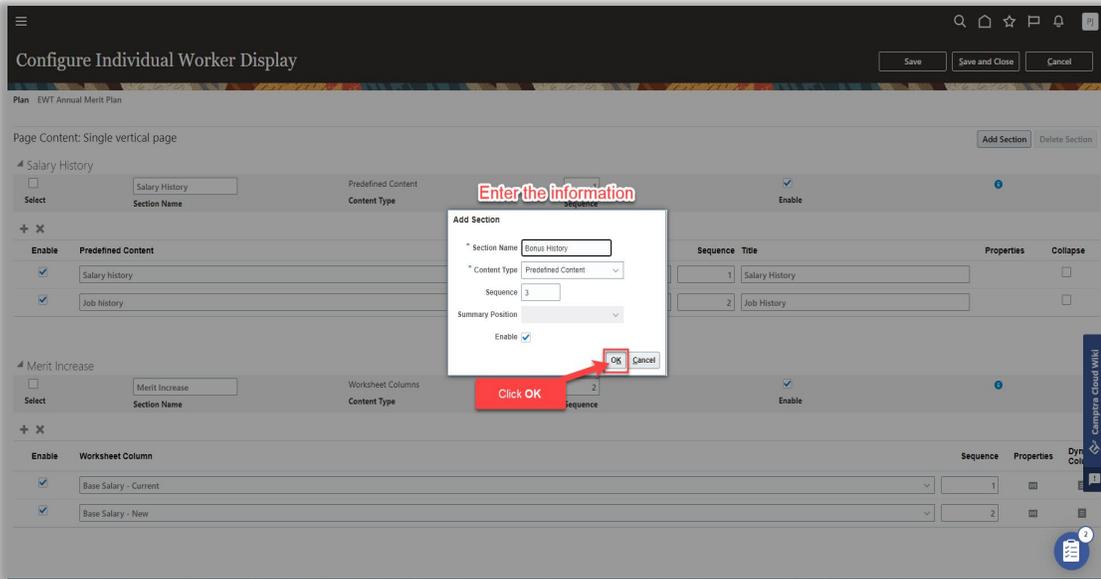
Next, we can select the **Page Style** and **Configure Content**. Click **Go to Task** under **Configure Content**



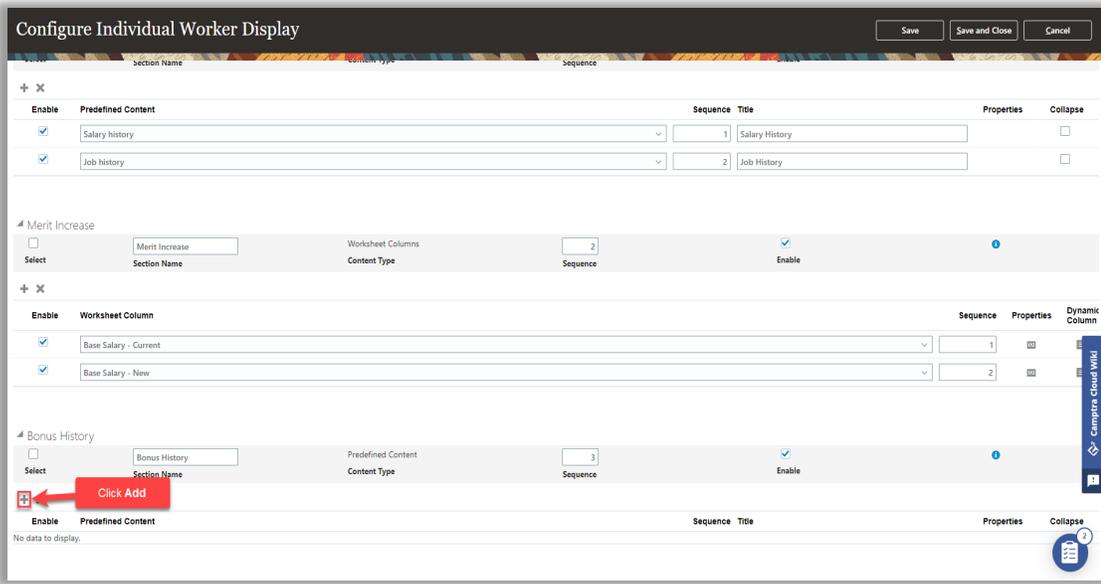
In this screen, we can add the **Page Content**. Click **Add Section** to add a new **section**



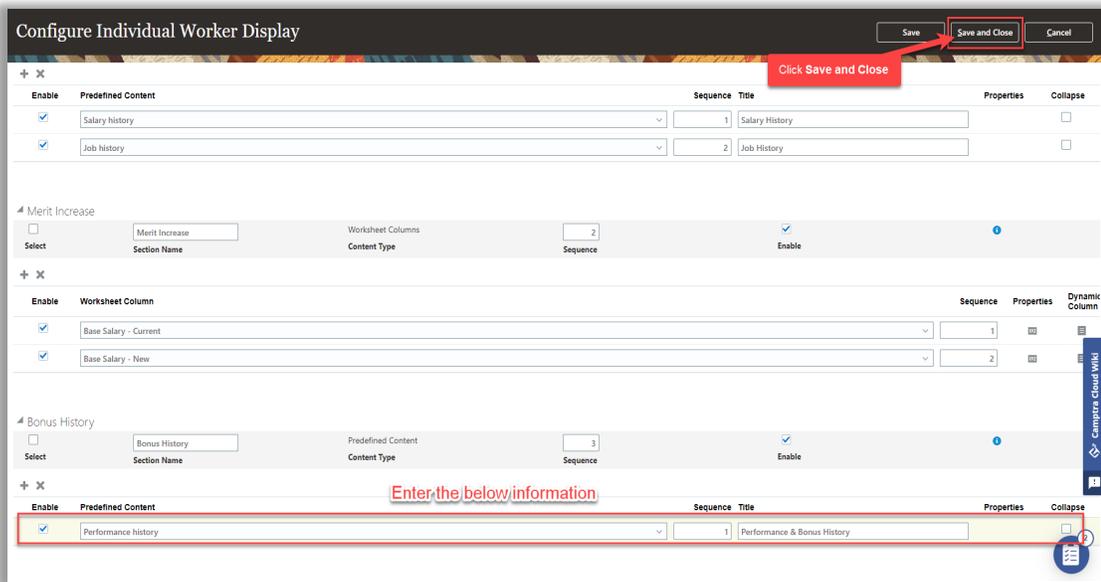
Enter the **Add Section** information and click **OK**



Click **Add** to add **Predefined Content**



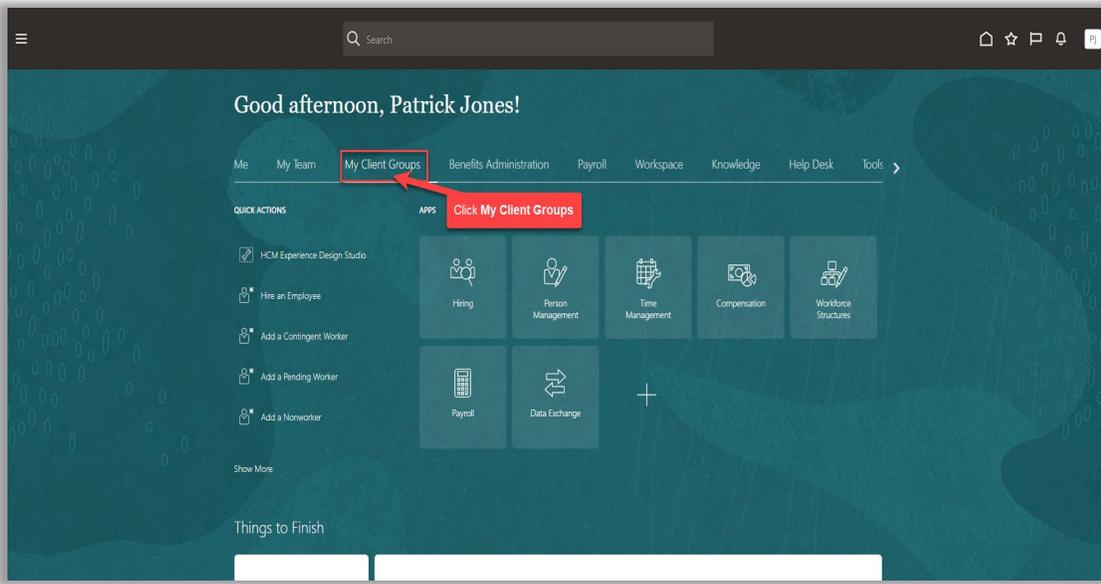
Enter the information and click **Save and Close**



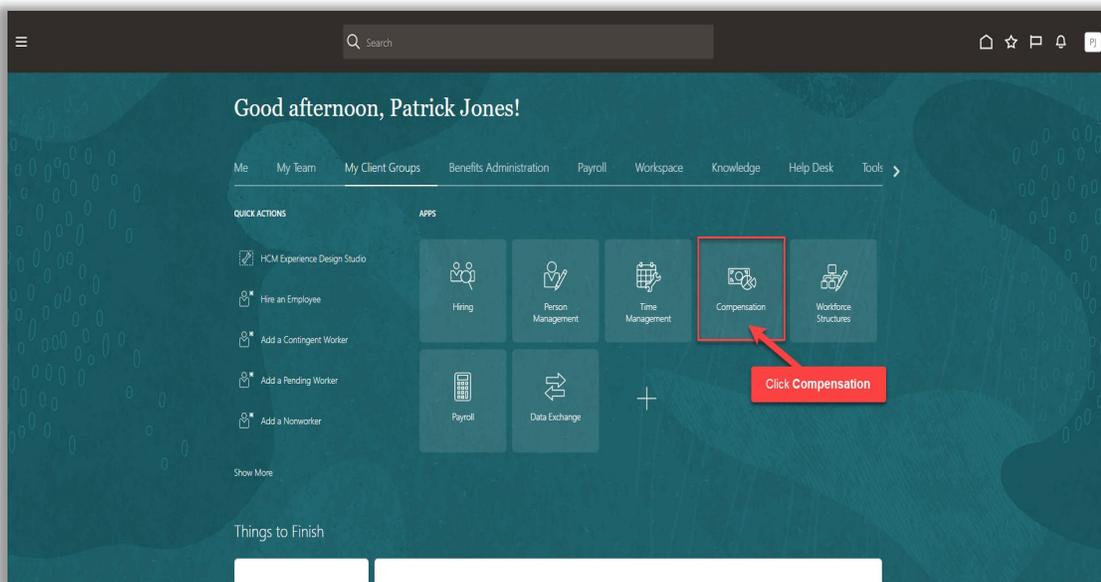
Overview Of Modeling

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Modeling>Enter or Update Information>Save and Close

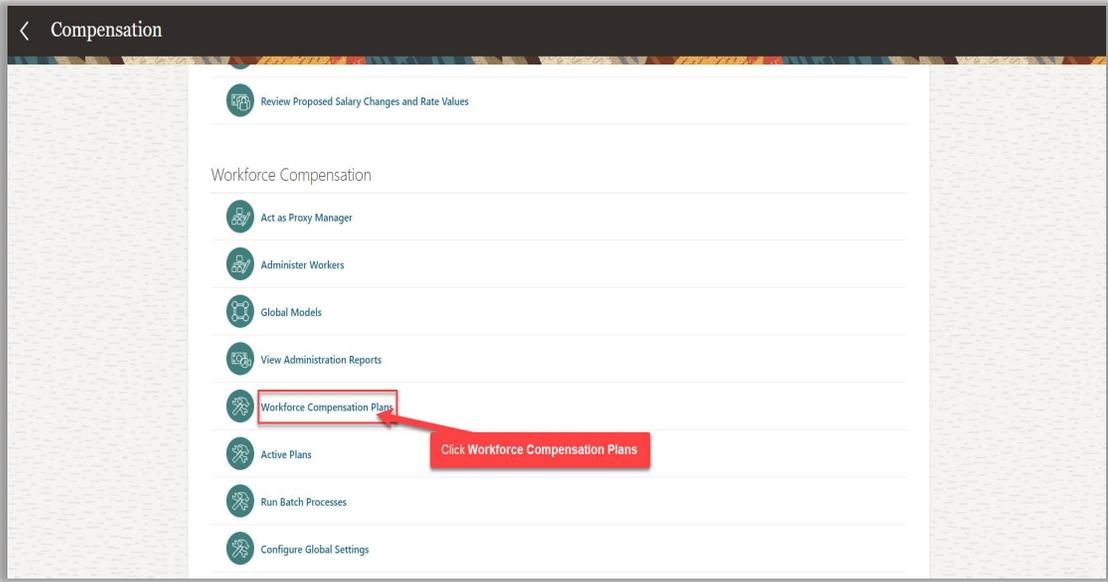
From the home screen, click **My Client Groups**



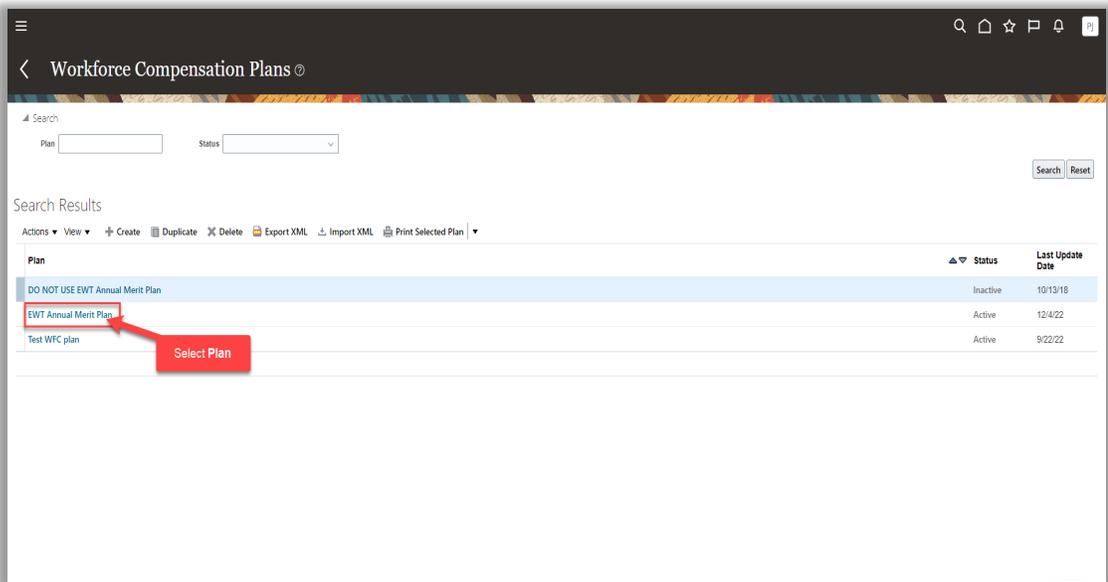
Next, click **Compensation**



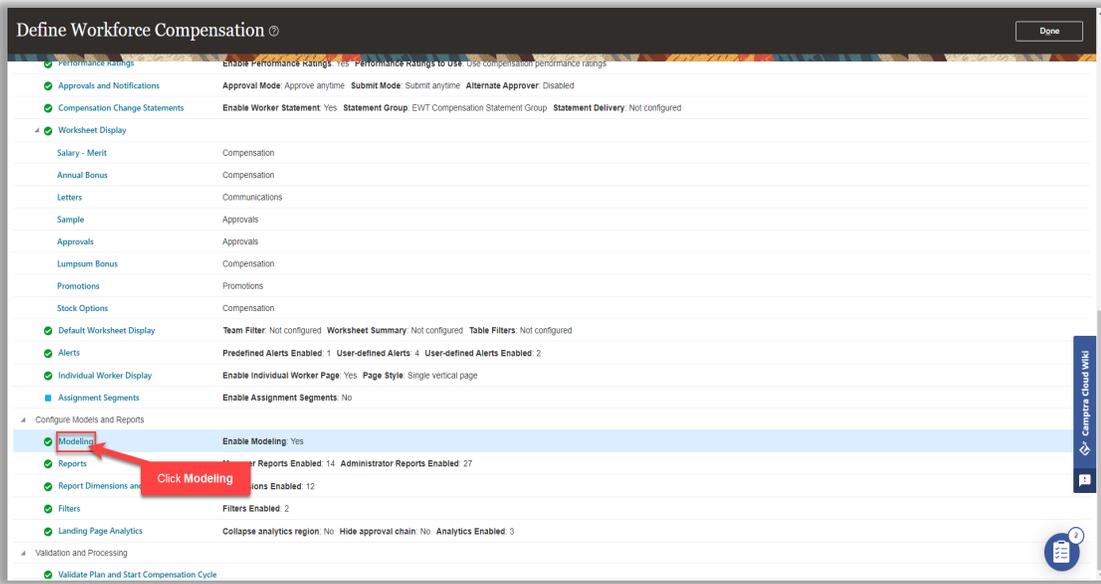
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



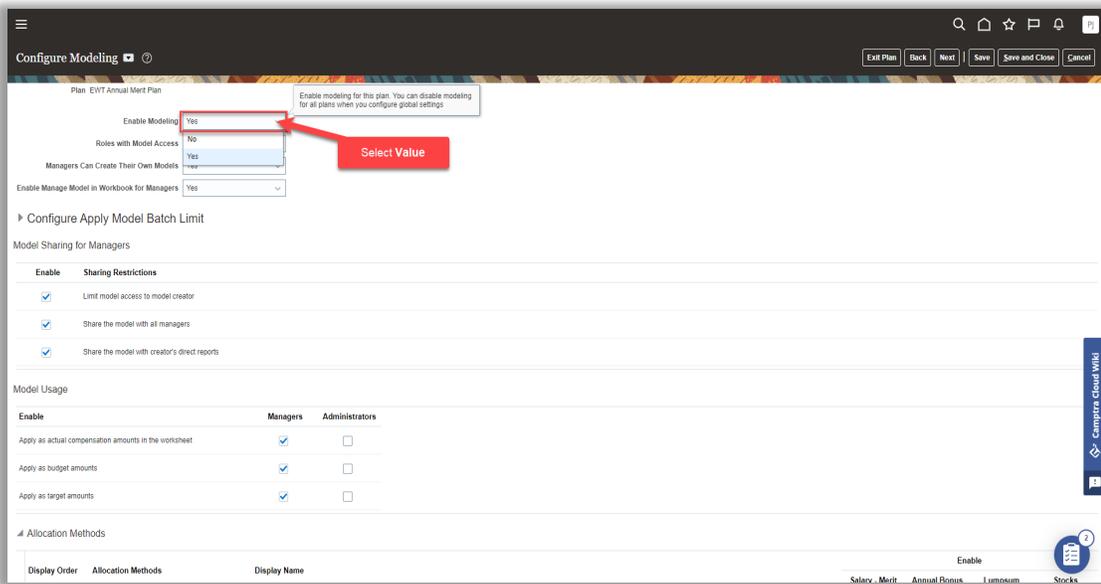
Select the Plan



Expand Configure Models and Reports and click Modeling



First, we can **Enable Modeling** and the below information from the drop downs



We can also update **Model Sharing for Managers** by enabling or disabling the check boxes

Configure Modeling ⌵ ⓘ

Exit Plan Back Next Save Save and Close Cancel

Enable Manage Model in Workbook for Managers Yes

Configure Apply Model Batch Limit

Model Sharing for Managers

Enable	Sharing Restrictions
<input checked="" type="checkbox"/>	Limit model access to model creator
<input checked="" type="checkbox"/>	Share the model with all managers
<input checked="" type="checkbox"/>	Share the model with creator's direct reports

Model Usage

Enable	Managers	Administrators
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Allocation Methods

Display Order	Allocation Methods	Display Name	Enable			
			Salary - Merit	Annual Bonus	Lumpsum	Stocks
1	Allocate n percent of eligible salary	Allocate n percent of eligible salary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Allocate n amount per person	Allocate n amount per person	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Allocate n percent of target amount	Allocate n percent of target amount	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Bring to n percentile in target range	Bring to n percentile in target range	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Next, we can update the **Model Usage** for **Managers** and **Administrators**

Configure Modeling ⌵ ⓘ

Exit Plan Back Next Save Save and Close Cancel

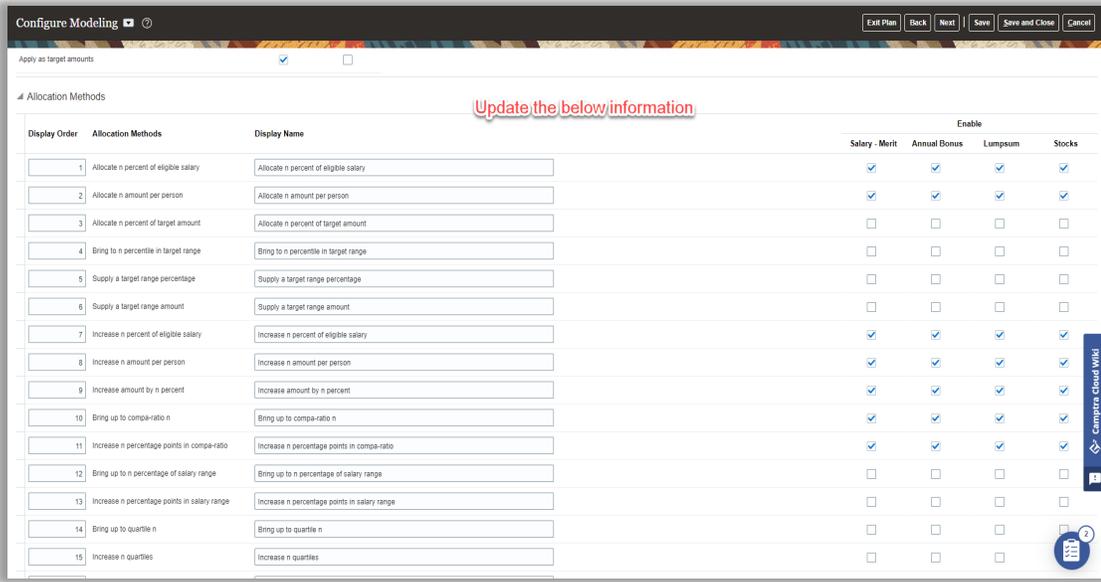
Model Usage

Enable	Managers	Administrators
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

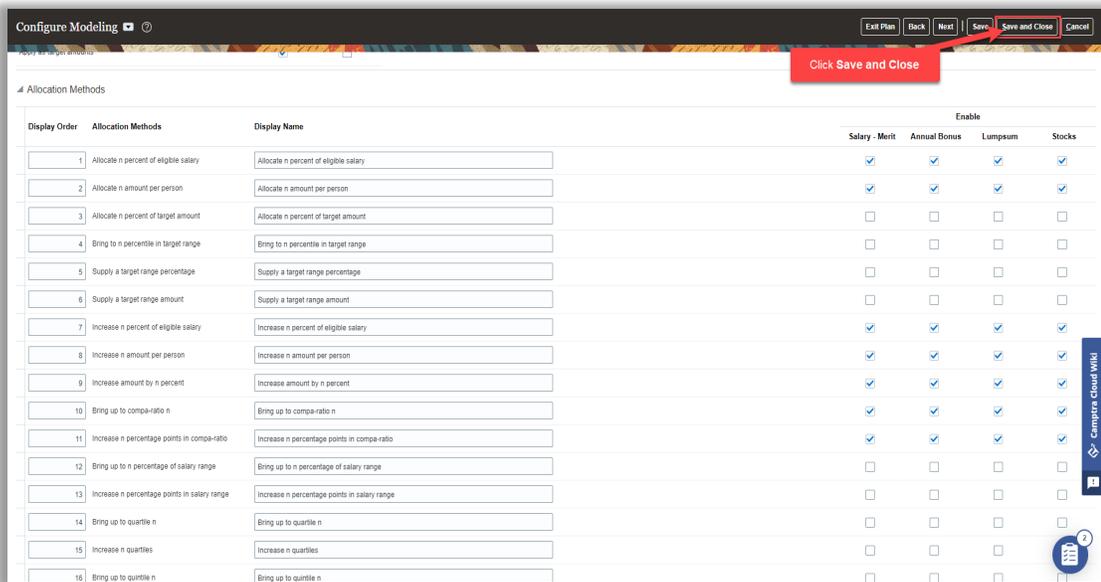
Allocation Methods

Display Order	Allocation Methods	Display Name	Enable			
			Salary - Merit	Annual Bonus	Lumpsum	Stocks
1	Allocate n percent of eligible salary	Allocate n percent of eligible salary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Allocate n amount per person	Allocate n amount per person	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Allocate n percent of target amount	Allocate n percent of target amount	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Bring to n percentile in target range	Bring to n percentile in target range	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Supply a target range percentage	Supply a target range percentage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Supply a target range amount	Supply a target range amount	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Increase n percent of eligible salary	Increase n percent of eligible salary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	Increase n amount per person	Increase n amount per person	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	Increase amount by n percent	Increase amount by n percent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	Bring up to compa-ratio n	Bring up to compa-ratio n	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11	Increase n percentage points in compa-ratio	Increase n percentage points in compa-ratio	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Next, we can update the **Allocation Methods** information



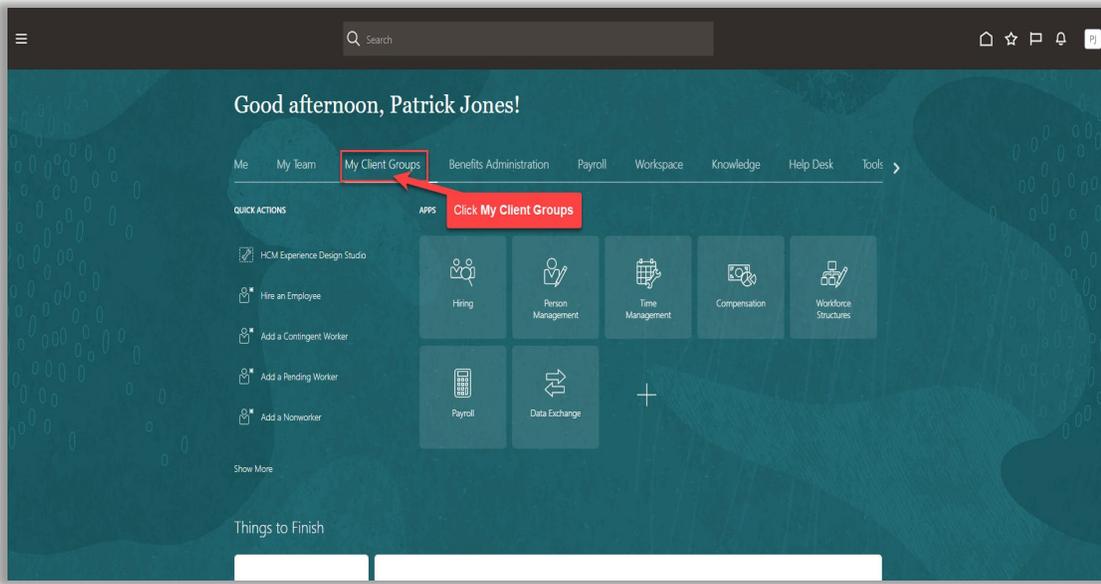
Once complete, click **Save and Close**



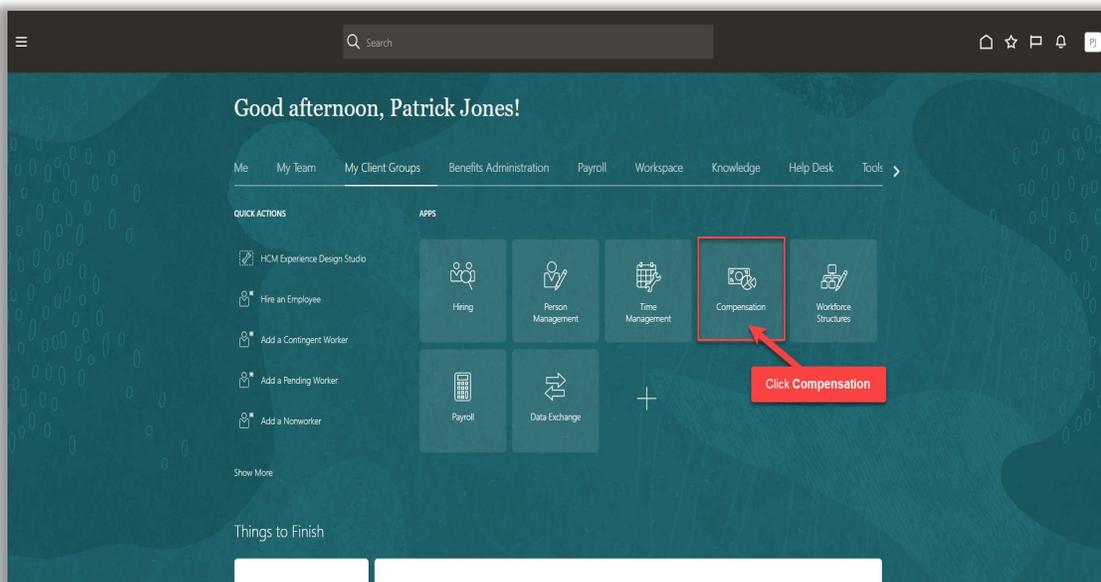
Reports And Report Dimensions In The Compensation Plan

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Reports>Enter or Update Information>Save and Close

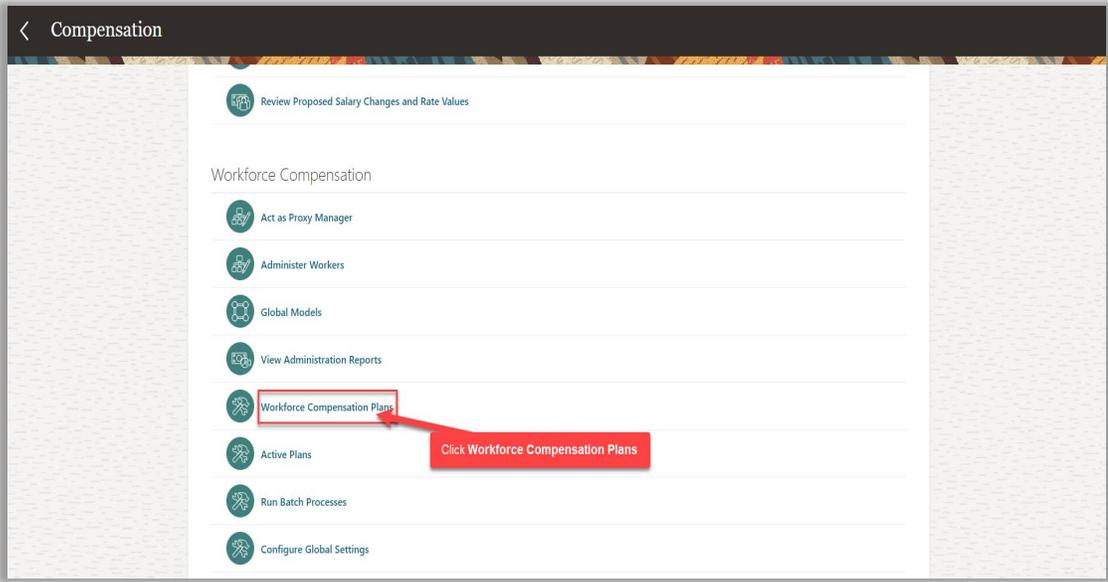
From the home screen, click **My Client Groups**



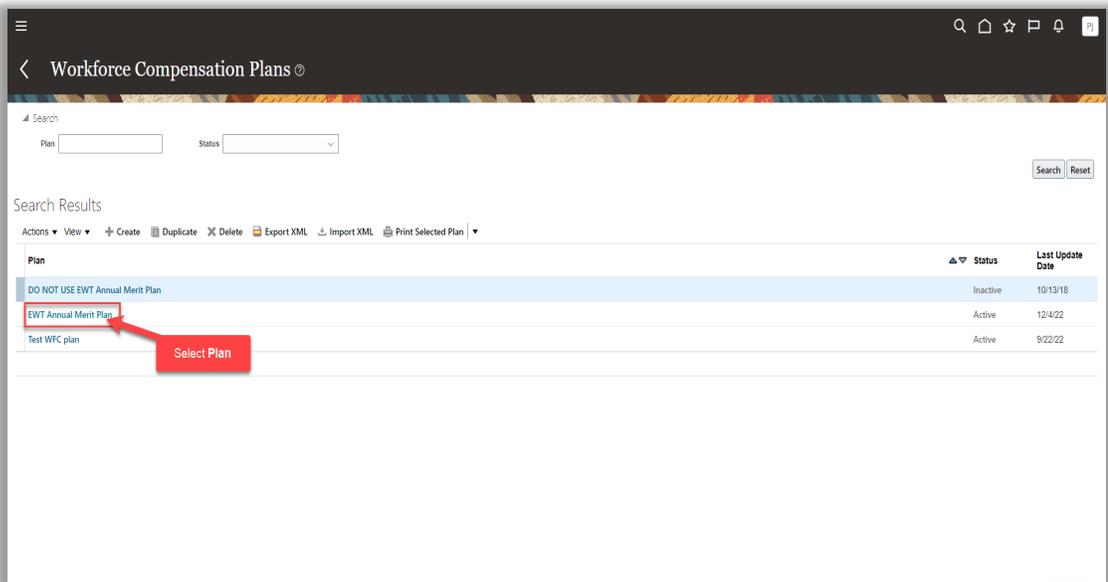
Next, click **Compensation**



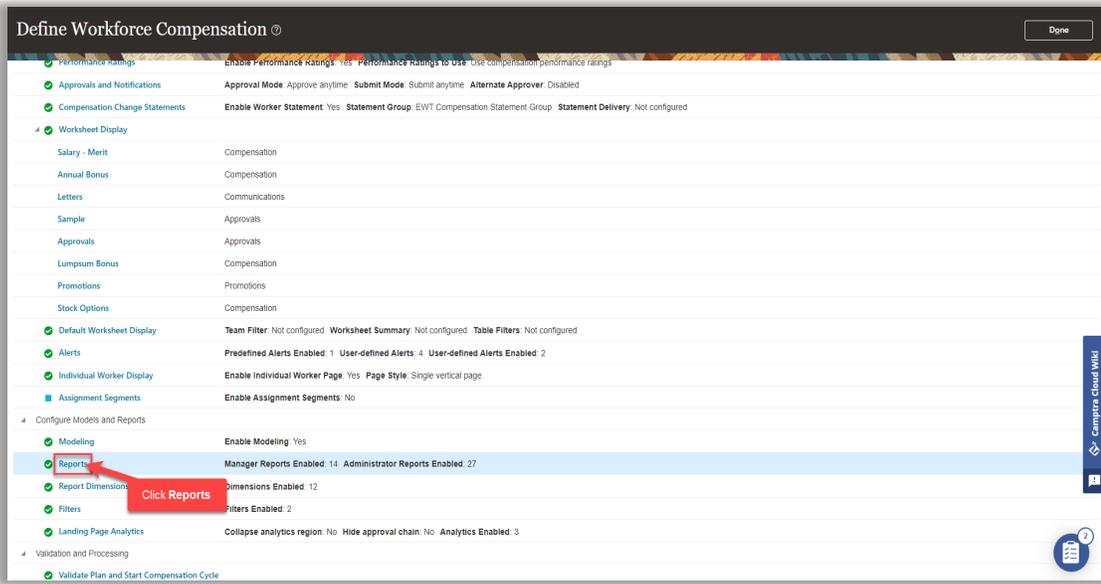
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



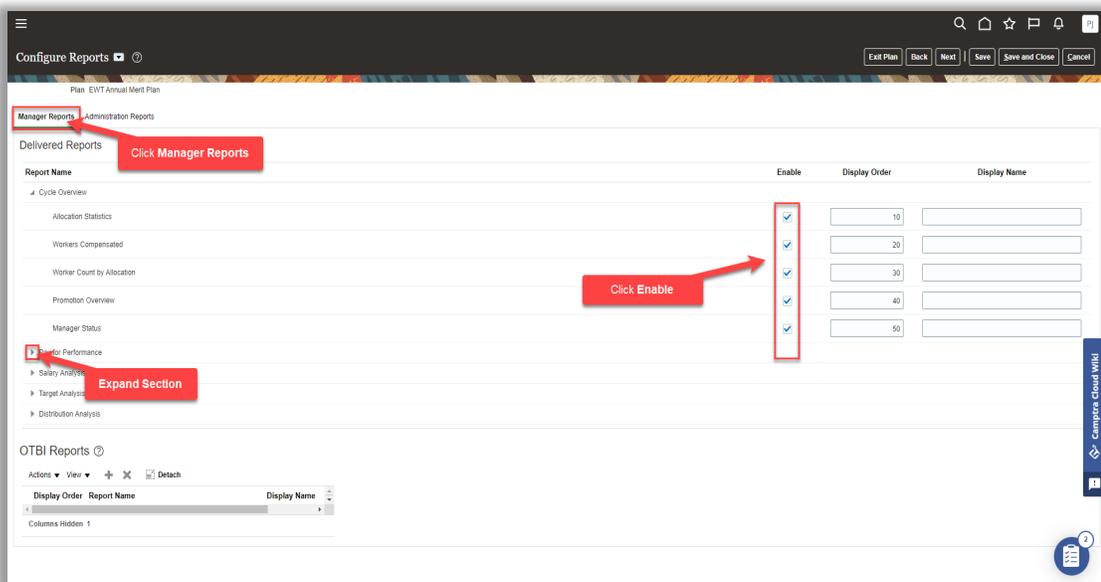
Select the Plan



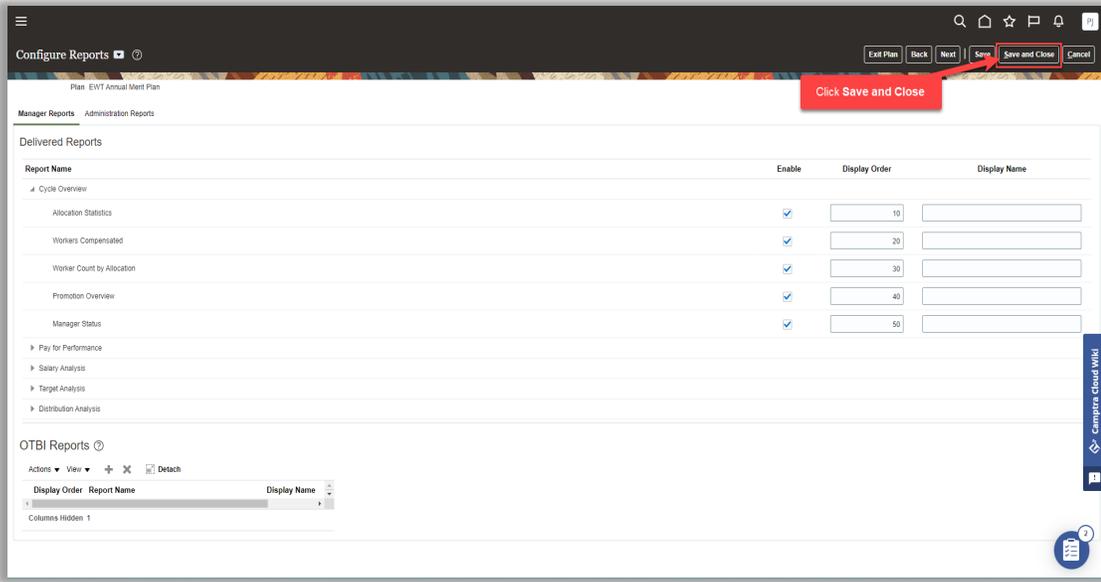
Expand Configure Models and Reports and click Reports



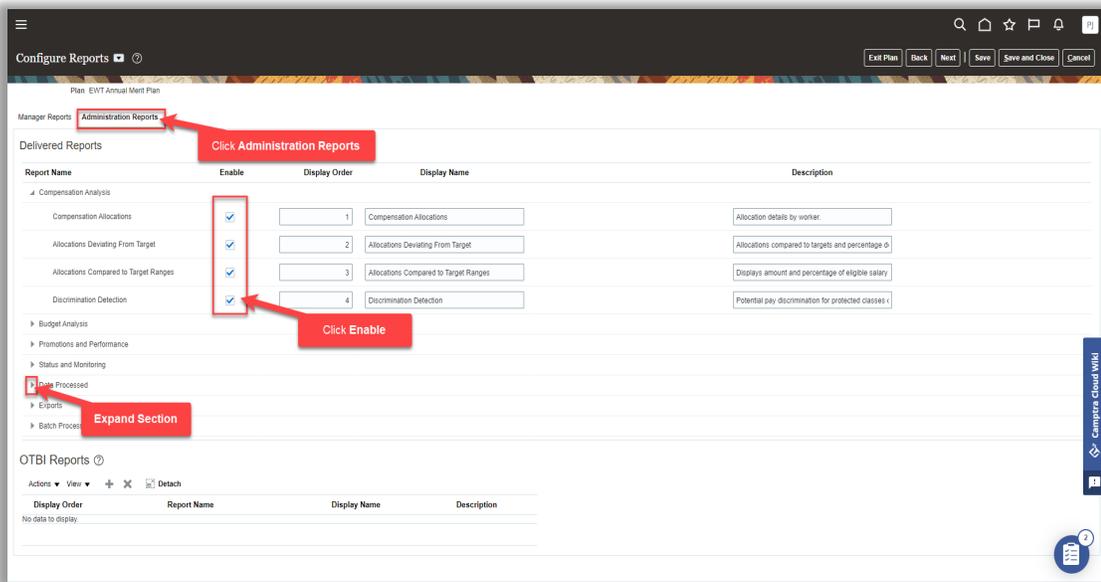
In this screen, we can enable and disable **Manager Reports** and **Administration Reports**. To manage the **Manager Reports**, we can **Enable** or **Disable** the reports. Select the **Manager Reports** Tab and enable the reports that are needed for Managers. We can also expand the sections to Enable or Disable additional reports



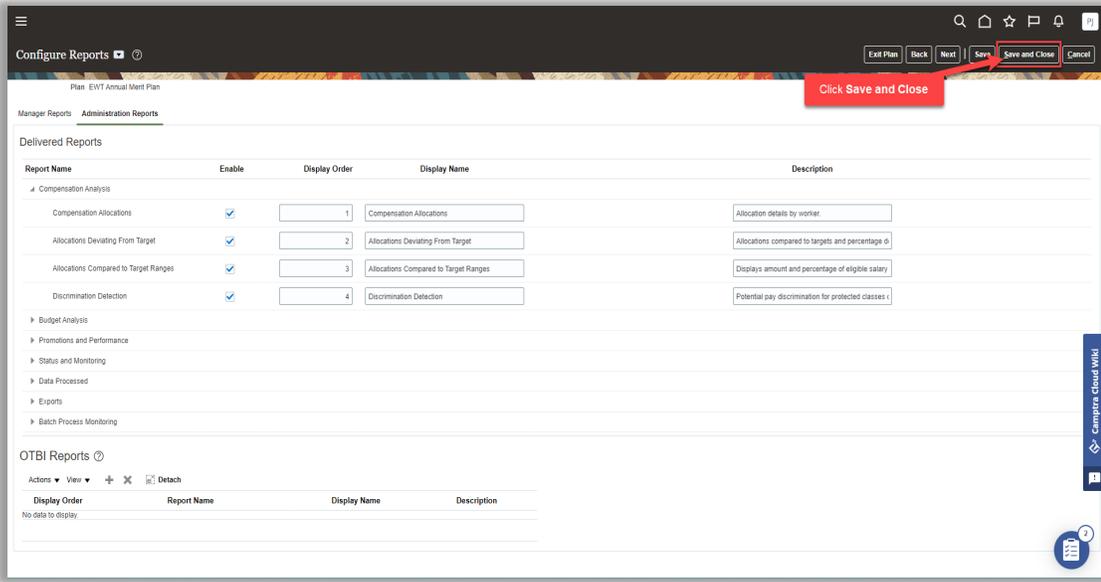
Click **Save and Close**



To manage the **Administration Reports**, we can **Enable** or **Disable** the reports. Select the **Administration Reports** Tab and enable the reports that are needed for the Administration Team. We can also expand the sections to Enable or Disable additional reports



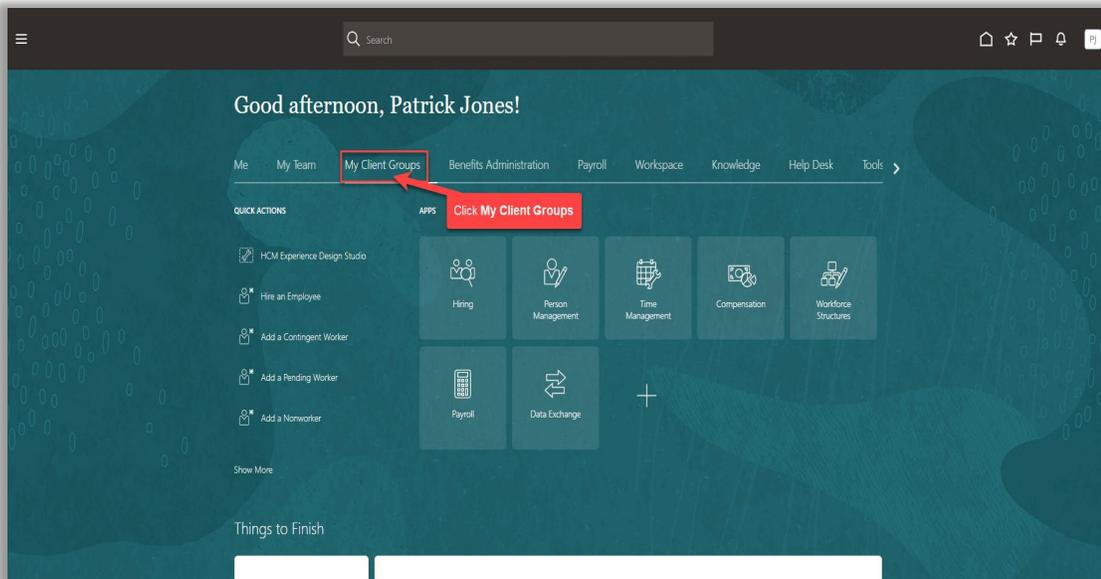
Click **Save and Close**



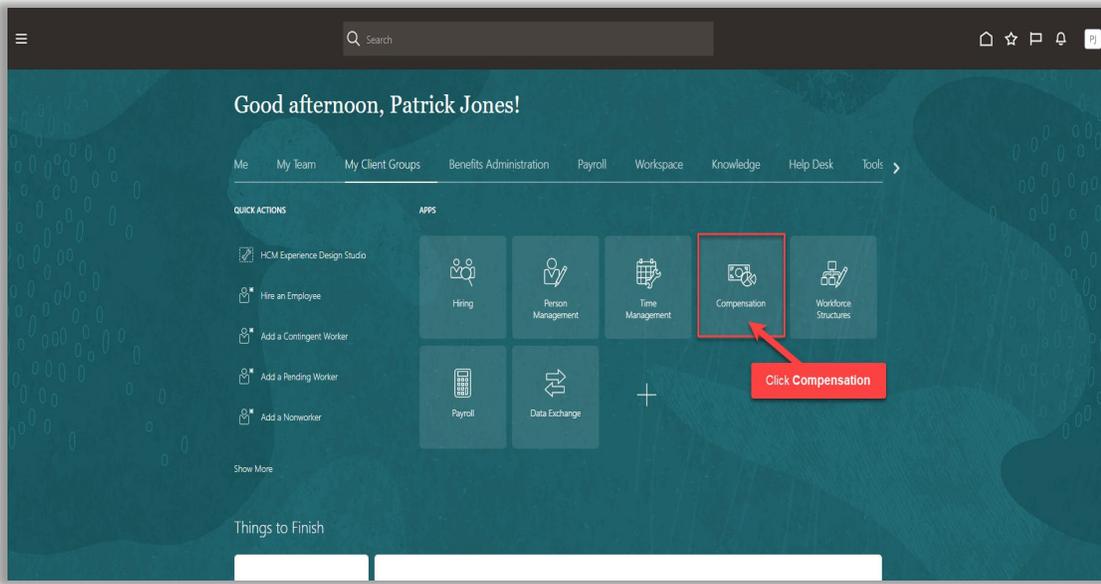
Configure Filters

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Filter>Enter or Update Information>Save and Close

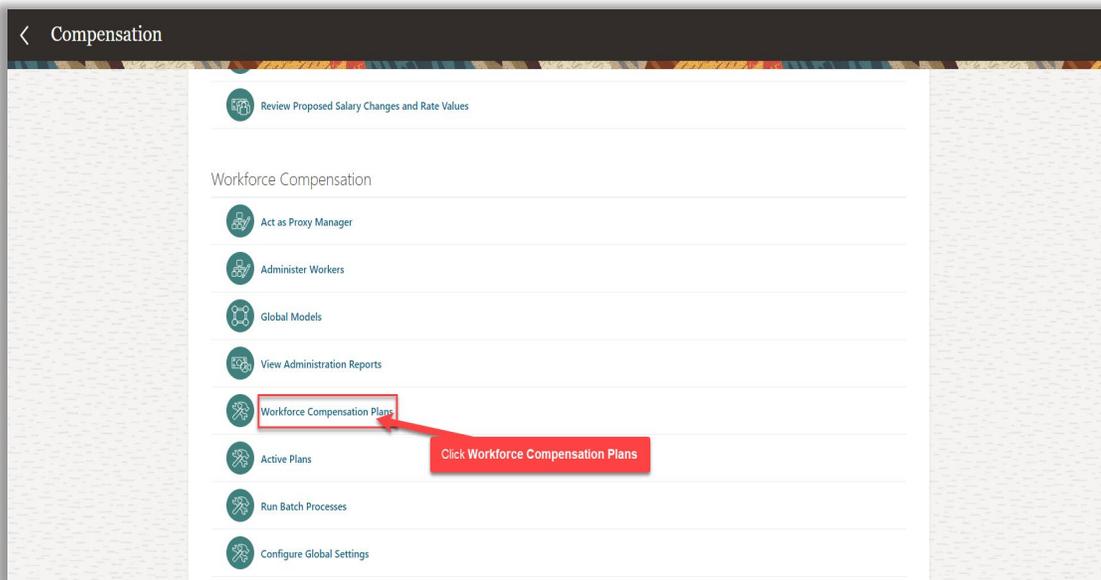
From the home screen, click **My Client Groups**



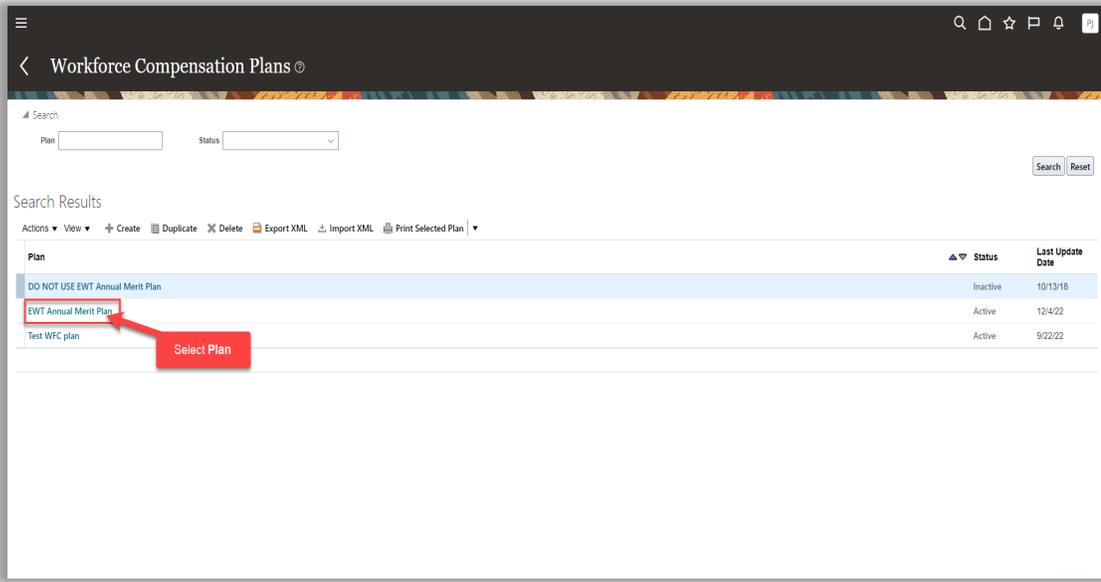
Next, click **Compensation**



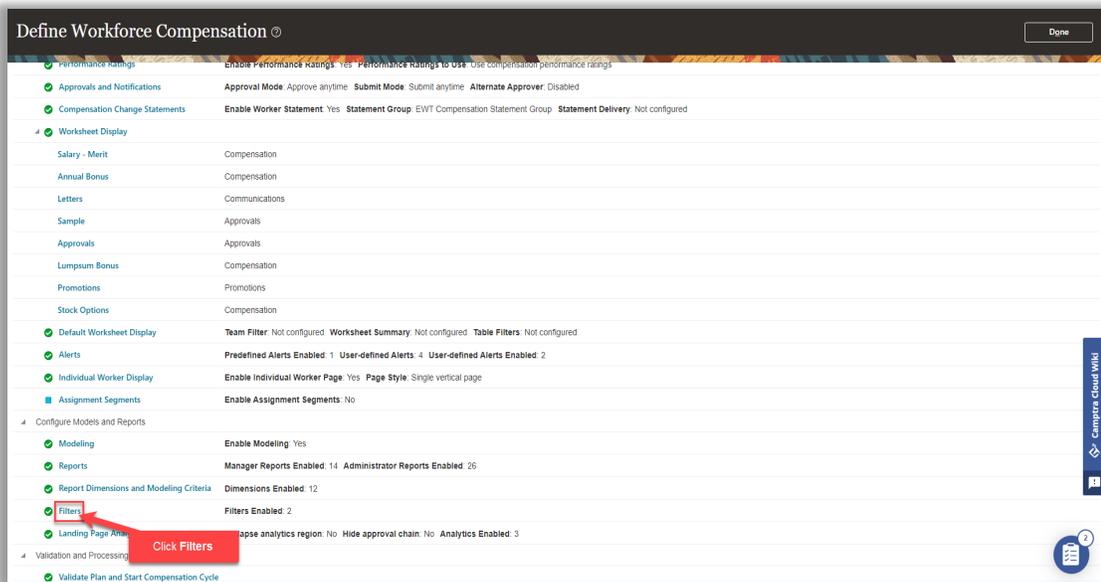
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



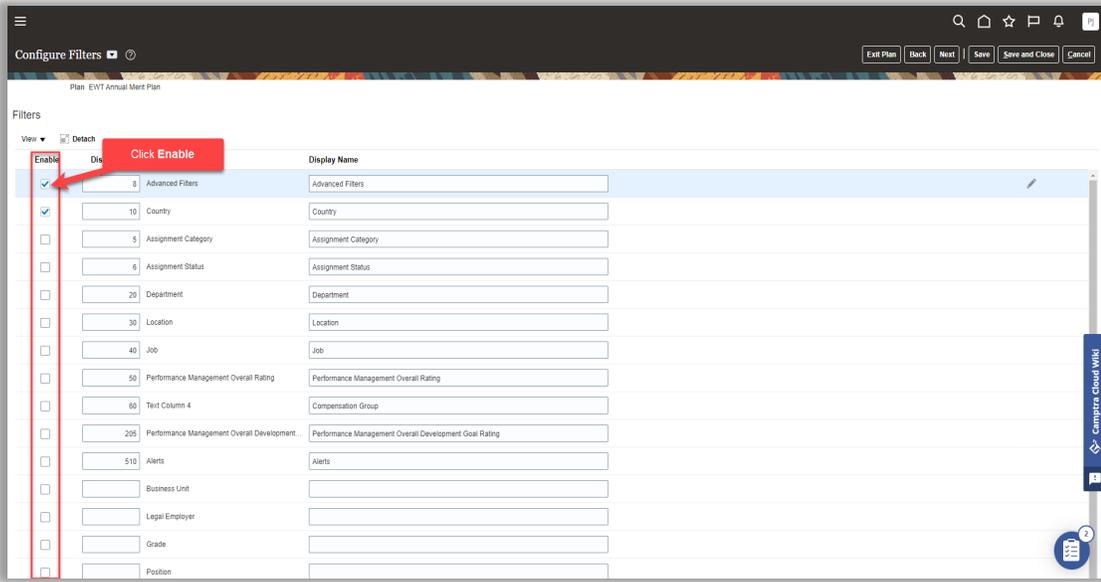
Select the Plan



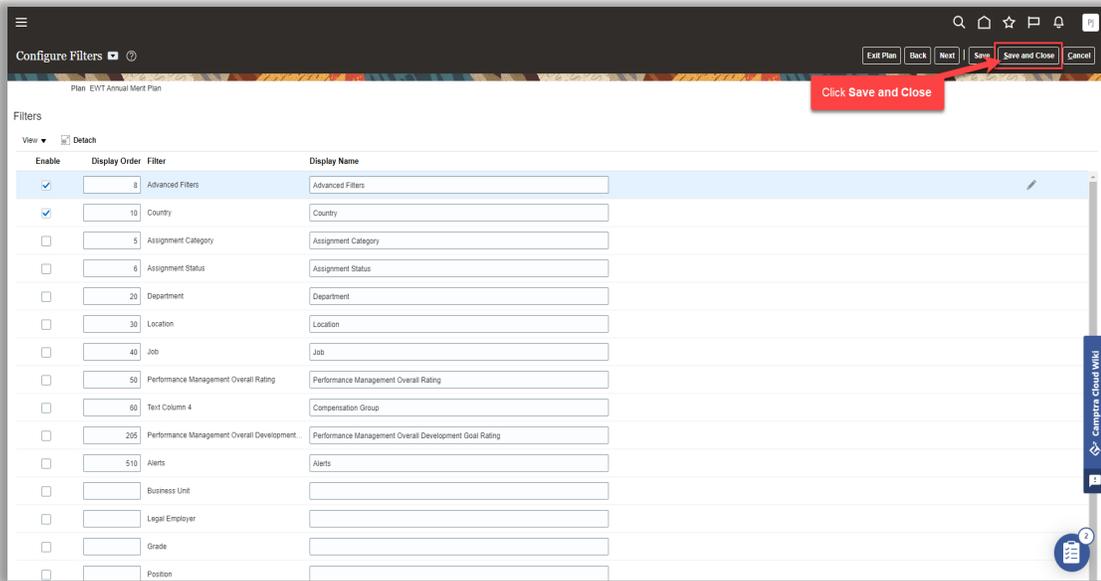
Expand Configure Models and Reports and click Filters



In this screen, we can Enable or Disable Filters by checking the checkbox under Enable, we can Enable a Filter



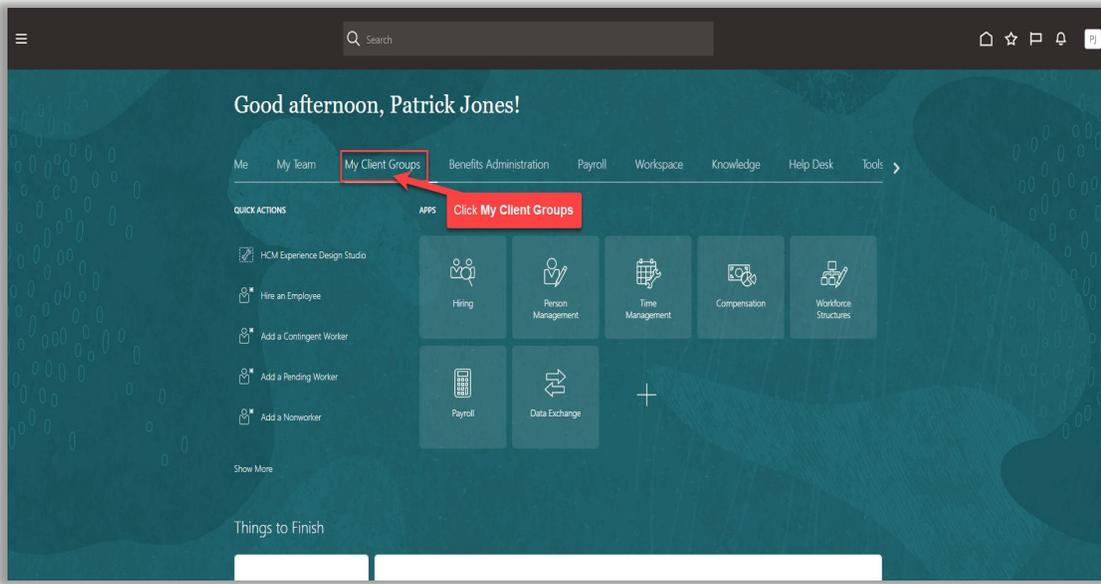
Once the **Filters** are **Enabled**, click **Save and Close**



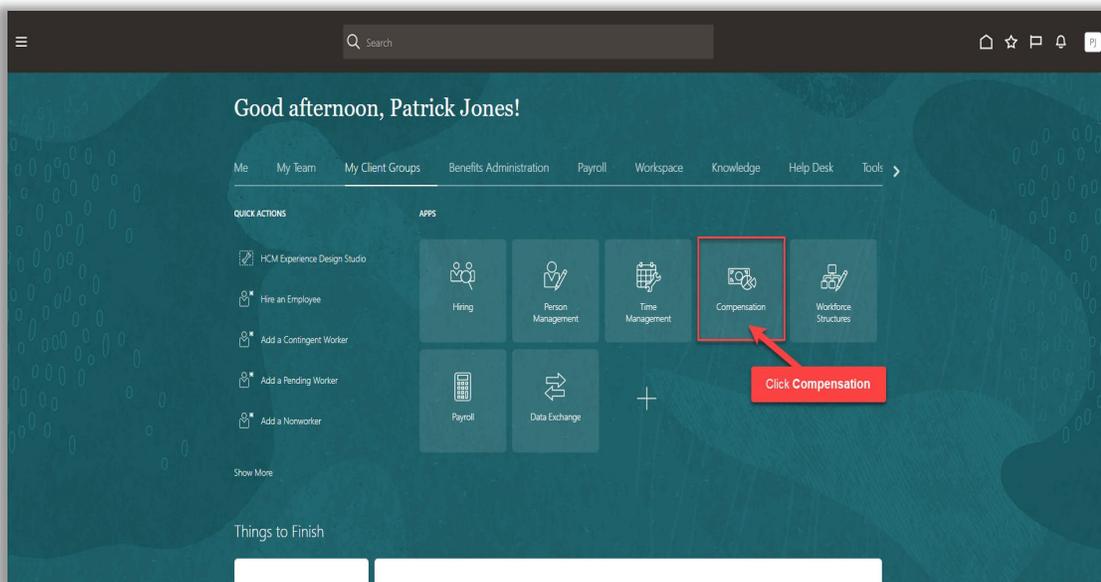
Configure Landing Page Analytics

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Landing Page Analytics>Enter or Update Information>Save and Close

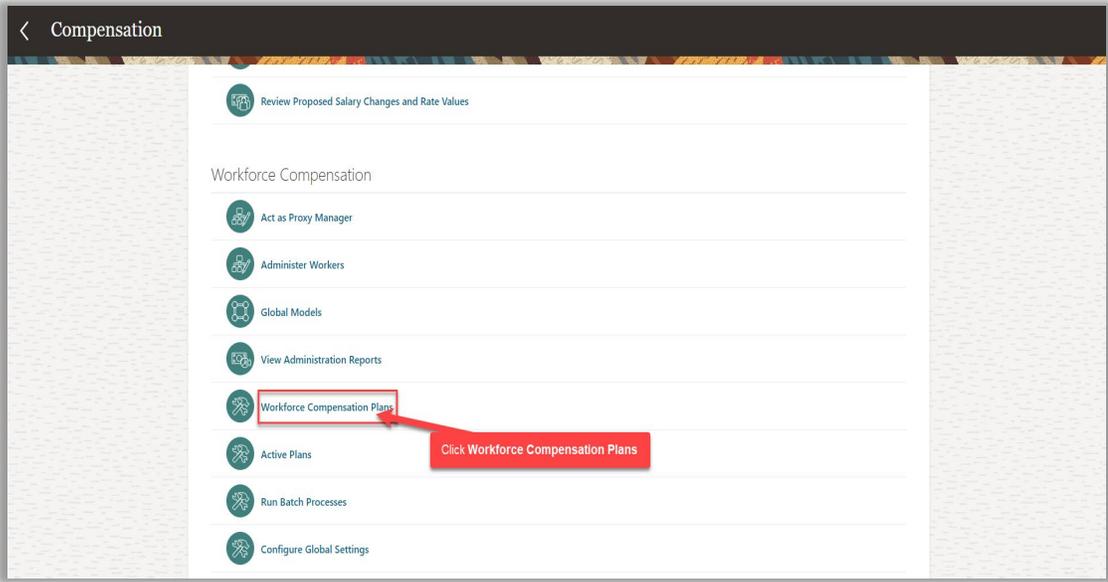
From the home screen, click **My Client Groups**



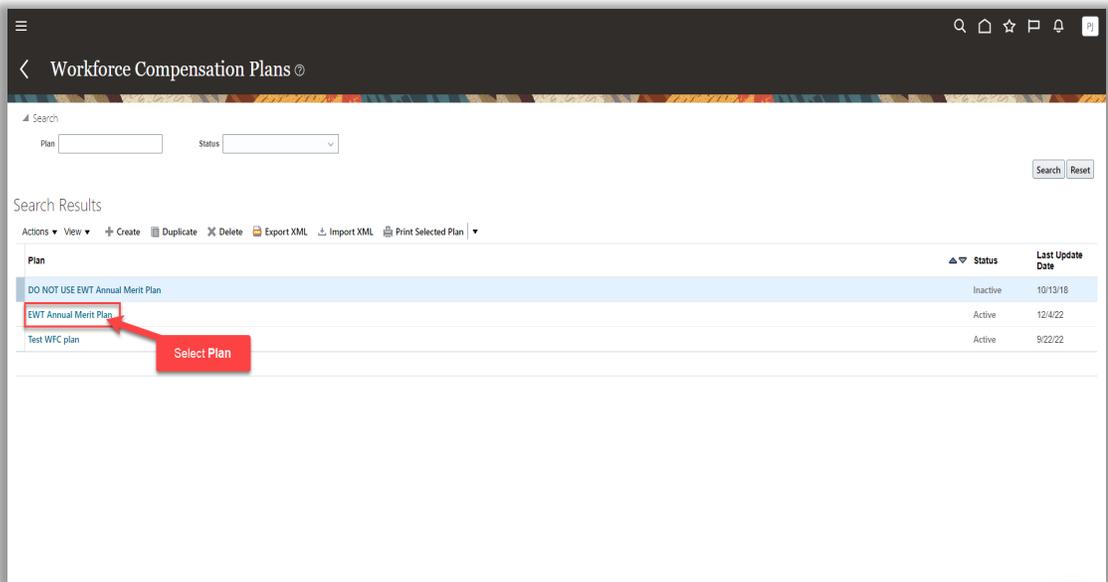
Next, click **Compensation**



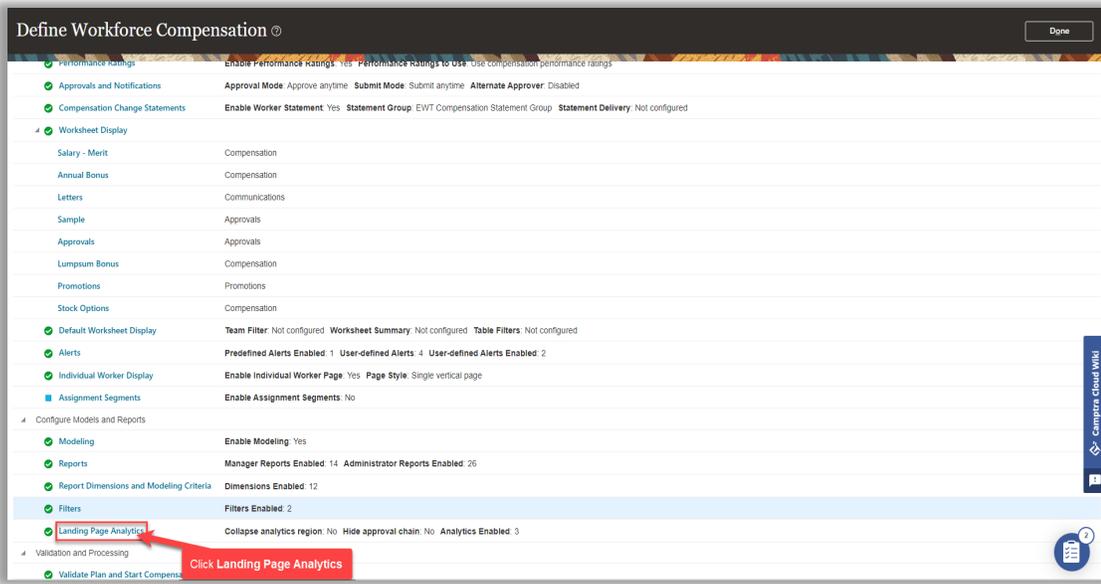
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



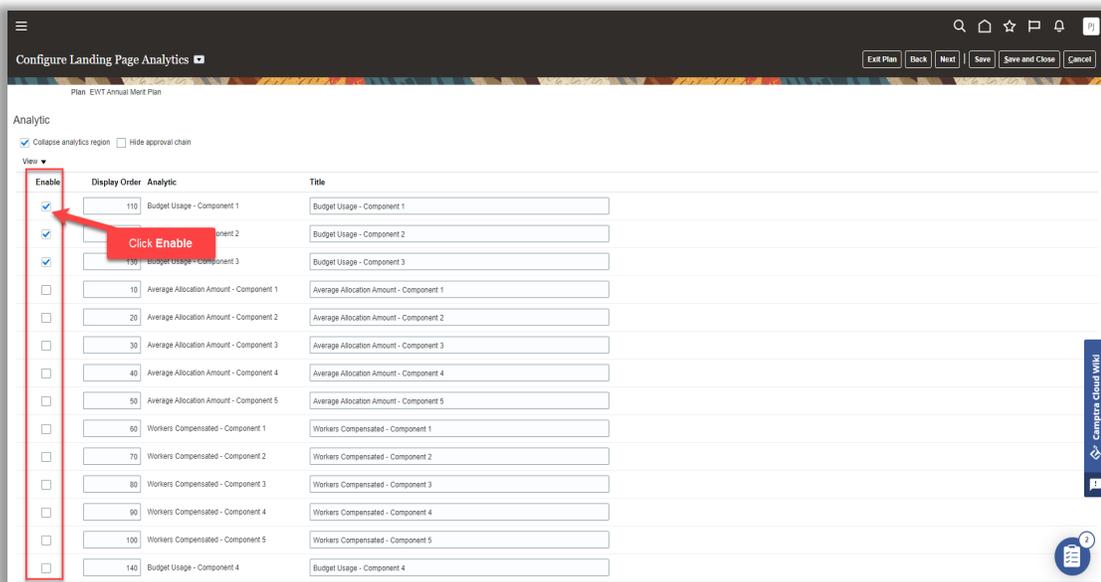
Select the Plan



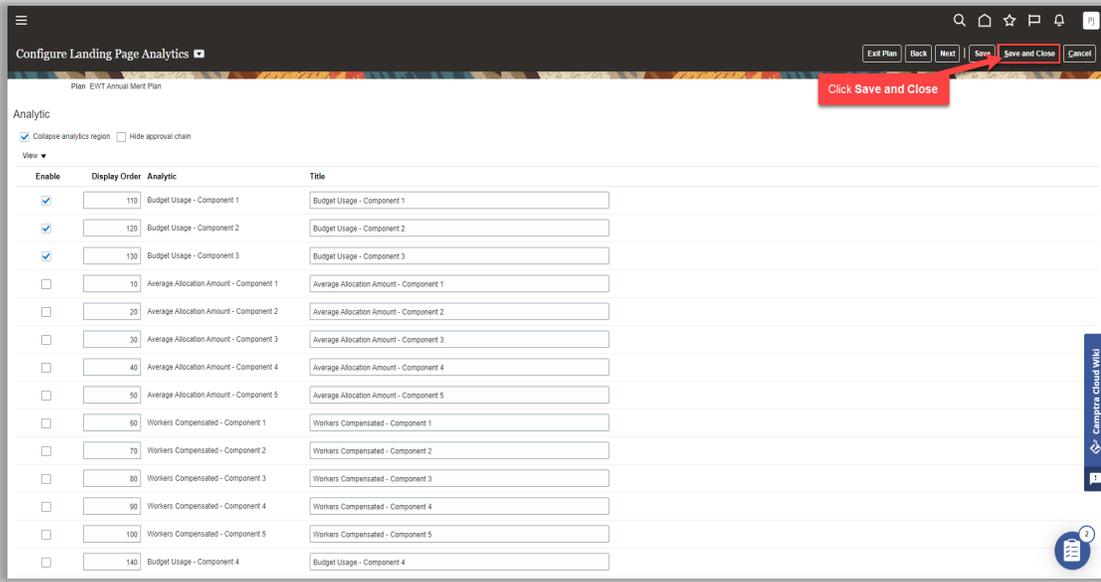
Expand Configure Models and Reports and click Landing Page Analytics



In this screen, we can Enable or Disable Analytics by checking the checkbox under **Enable**, we can Enable the Analytic



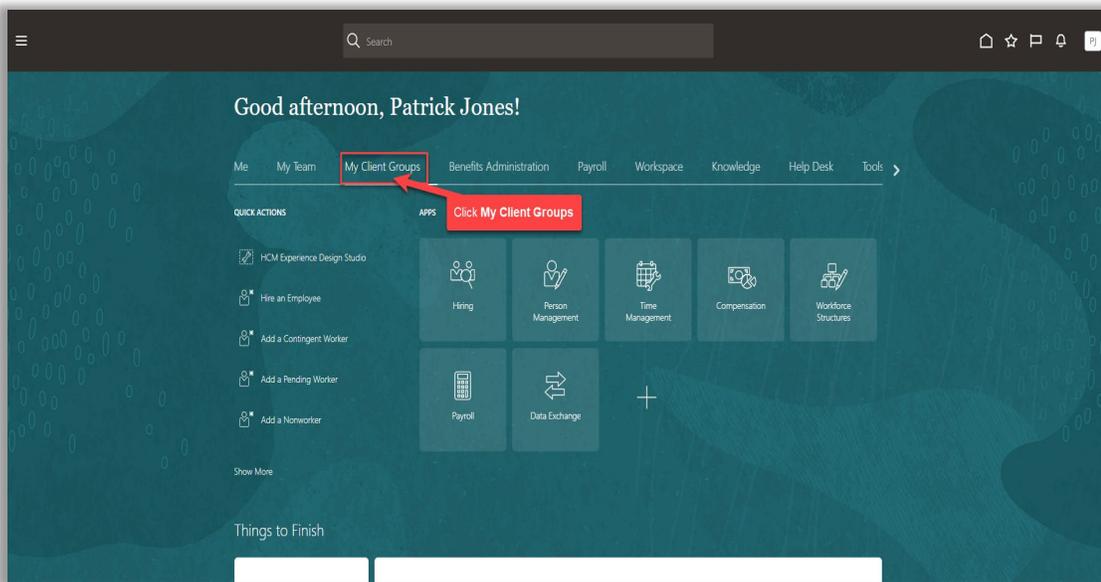
Once the **Analytics** are Enabled, click **Save and Close**



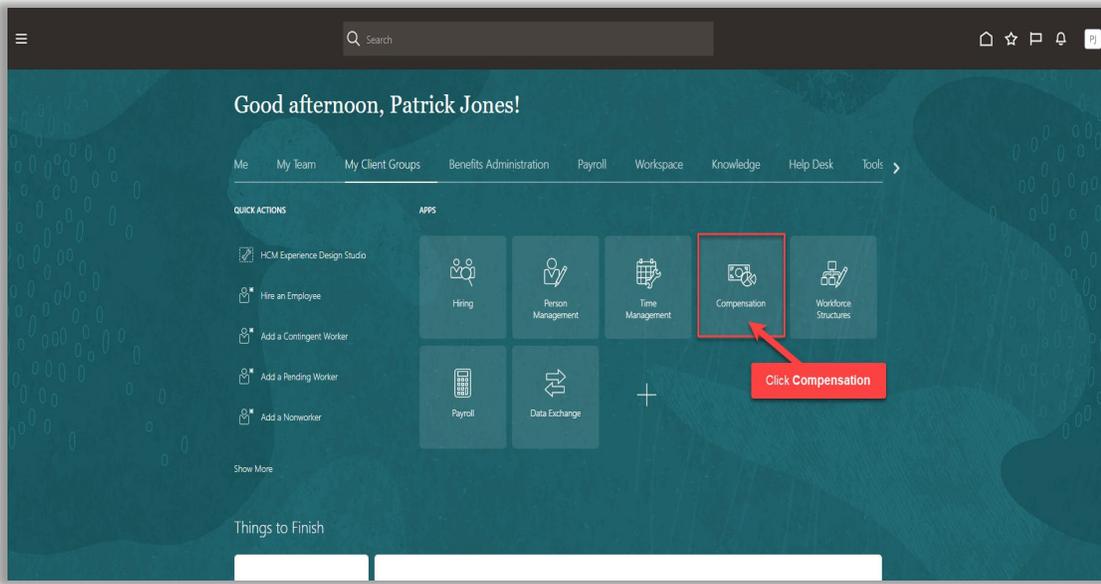
Configure Compensation Statements

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Compensation Change Statements>Enter or Update Information>Save and Close

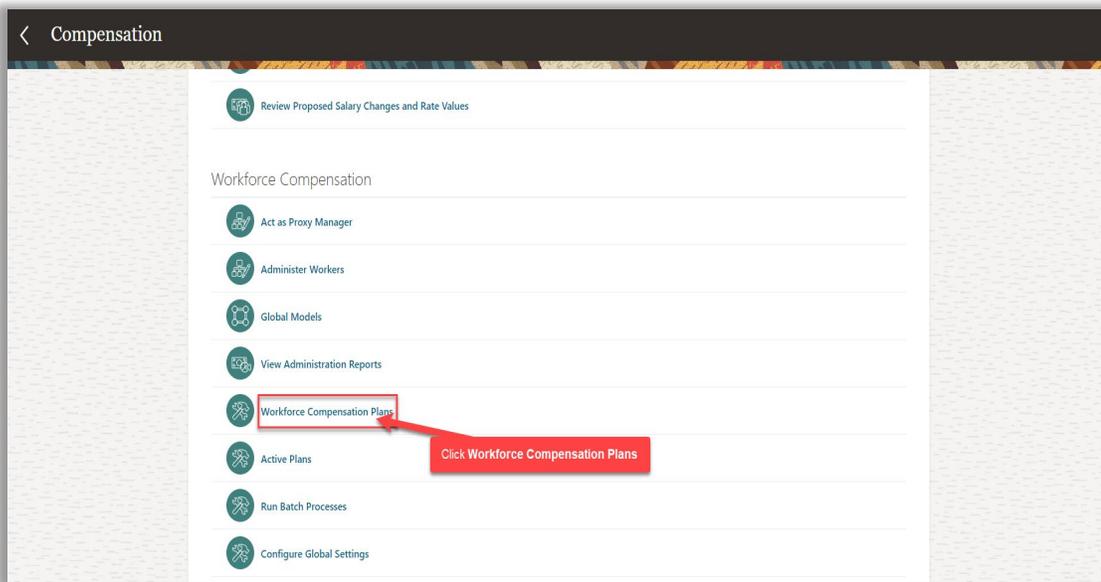
From the home screen, click **My Client Groups**



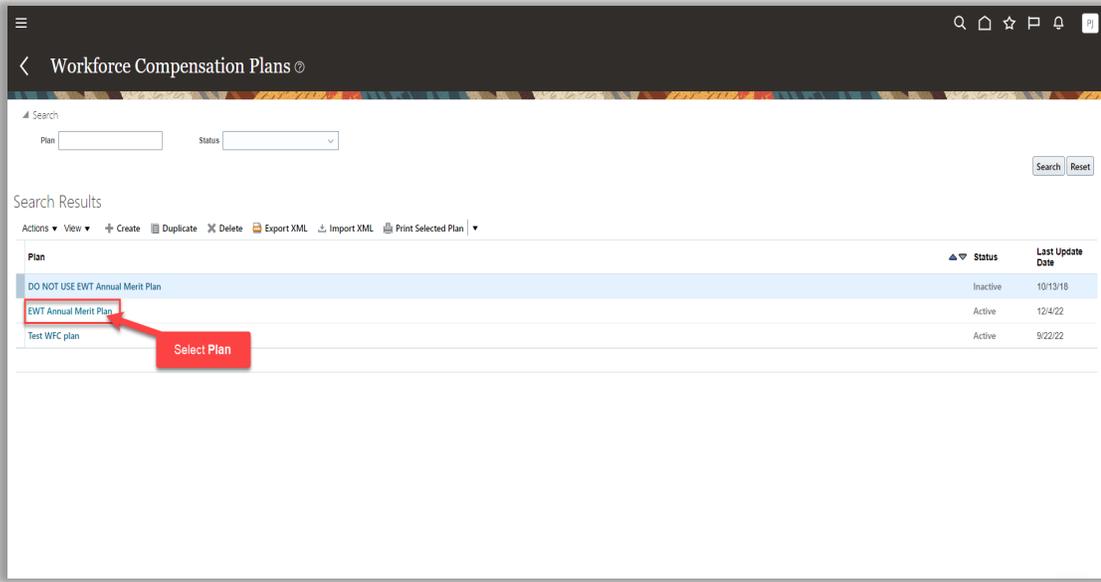
Next, click **Compensation**



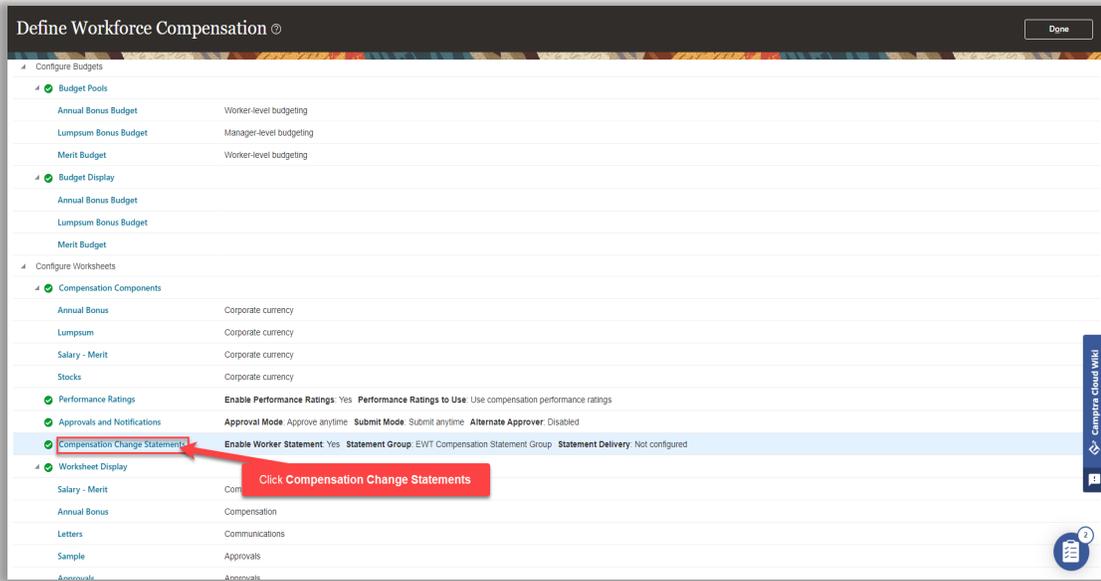
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



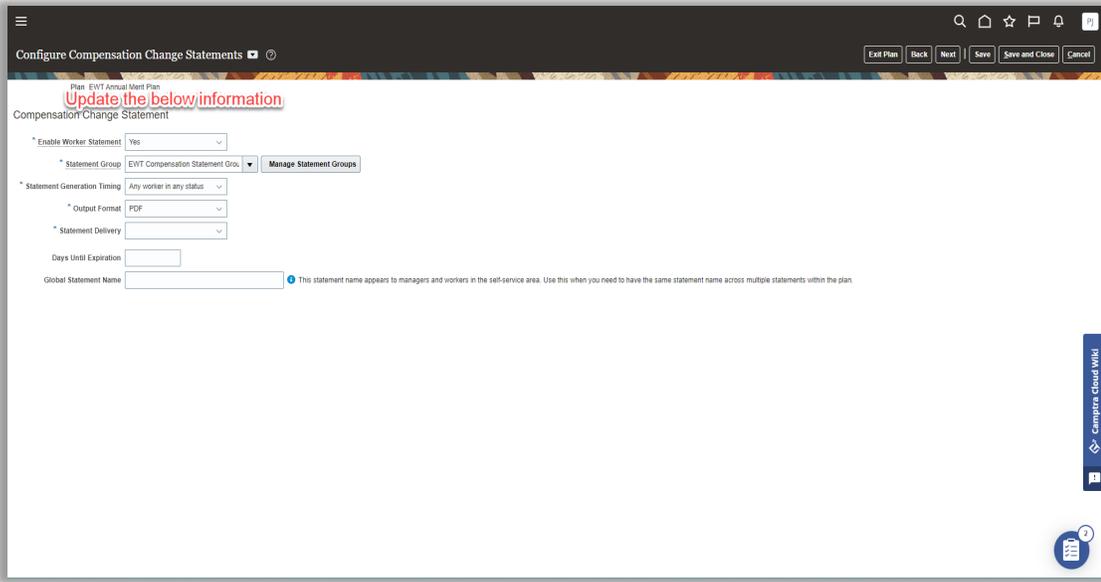
Select the Plan



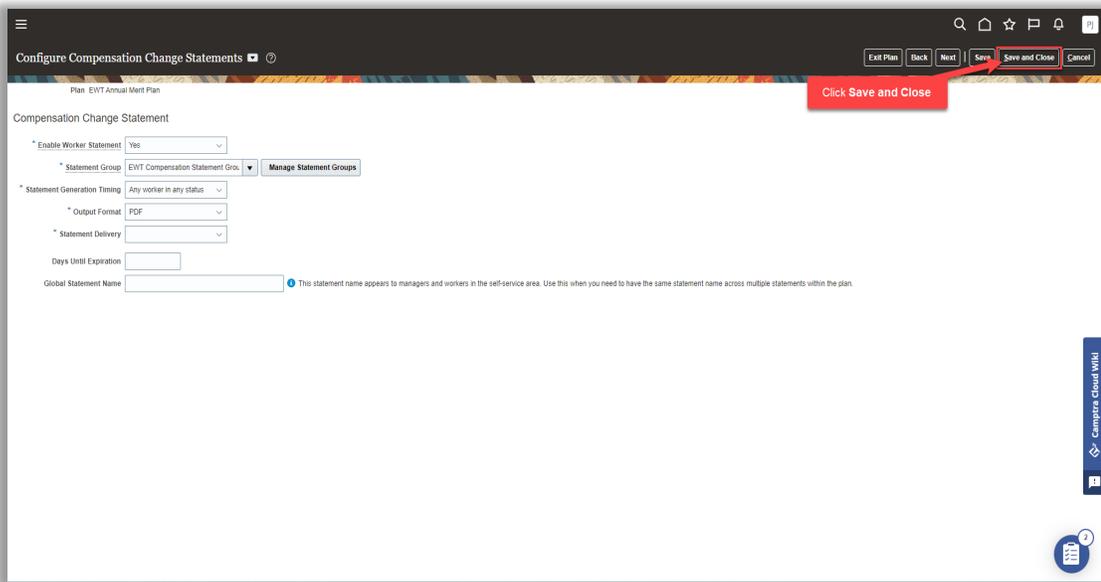
Expand **Configure Worksheets** and click **Compensation Change Statements**



Here we can manage the **Compensation Change Statement** by updating the information



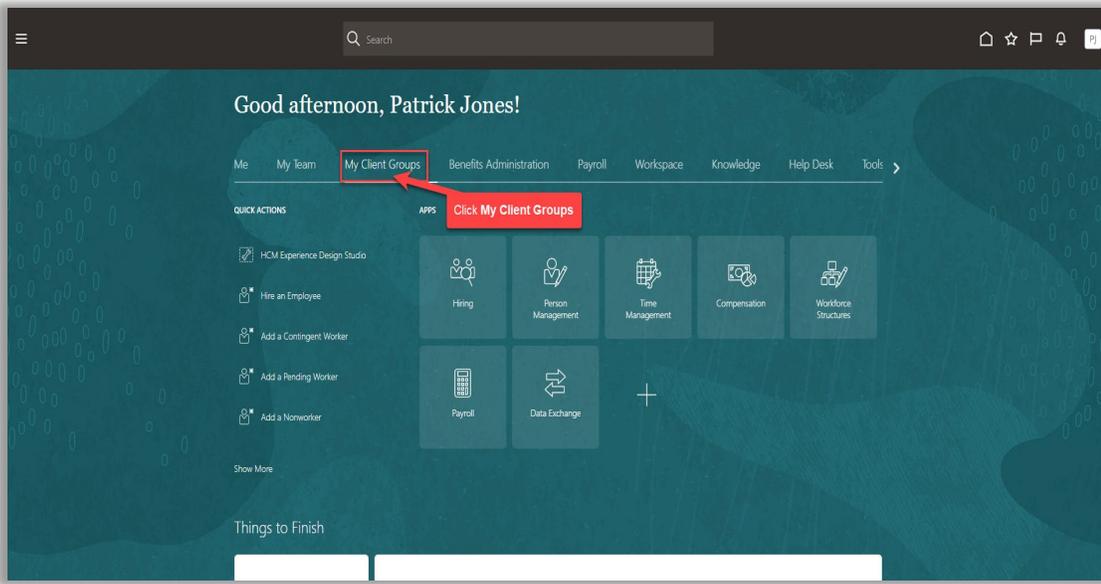
Once the information is entered, click **Save and Close**



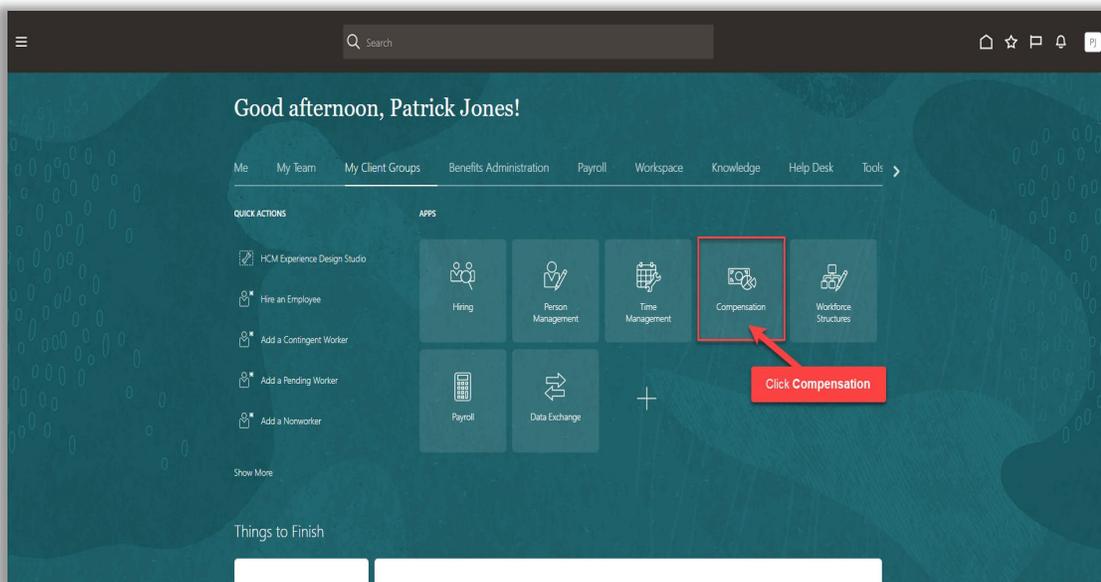
Manage Compensation Statement Groups

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Compensation Change Statements>Enter or Update Information>Save and Close

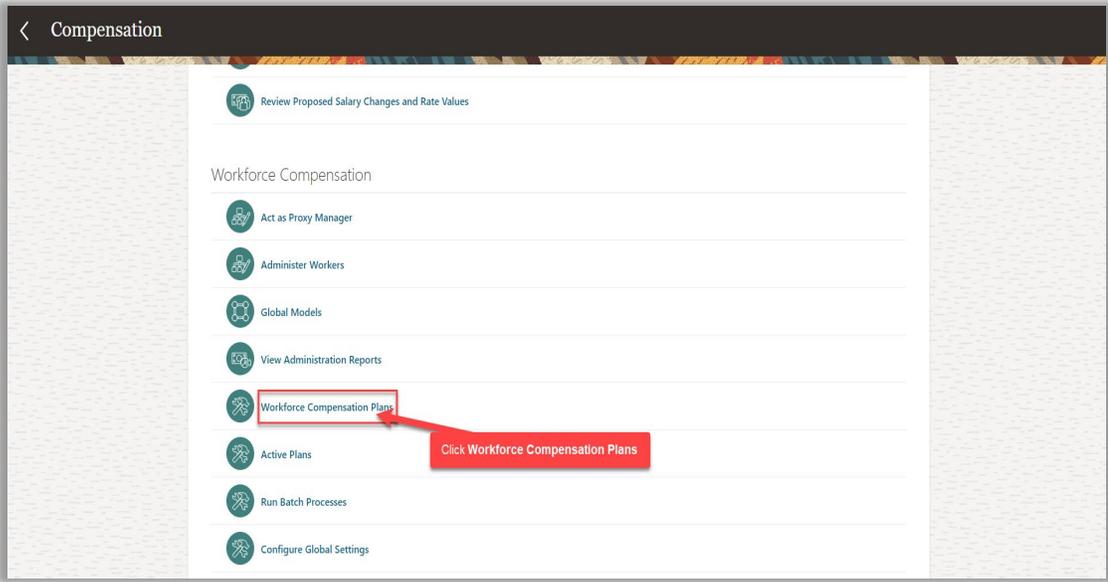
From the home screen, click **My Client Groups**



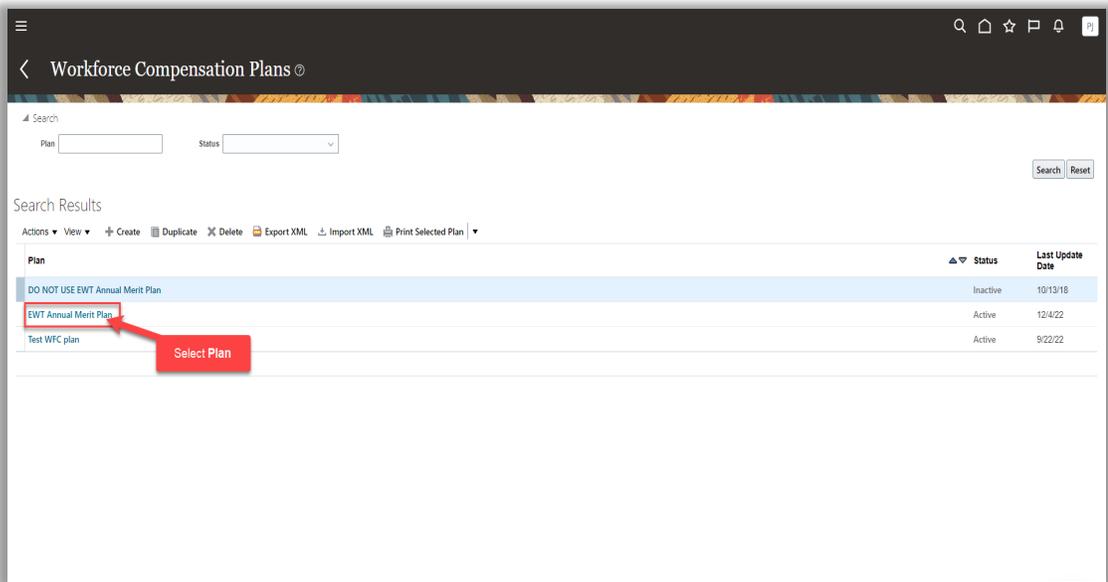
Next, click **Compensation**



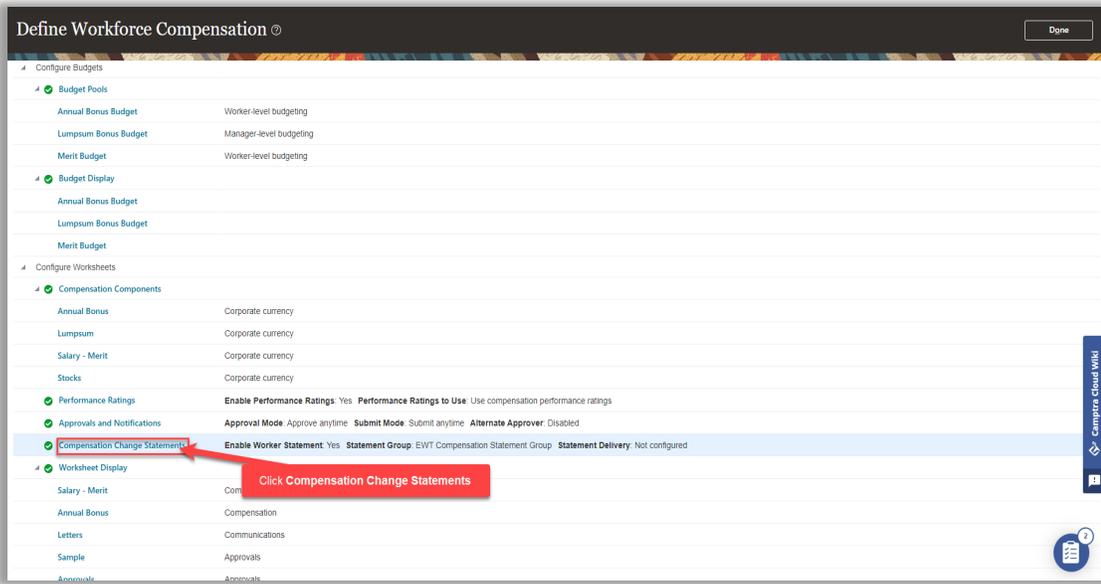
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



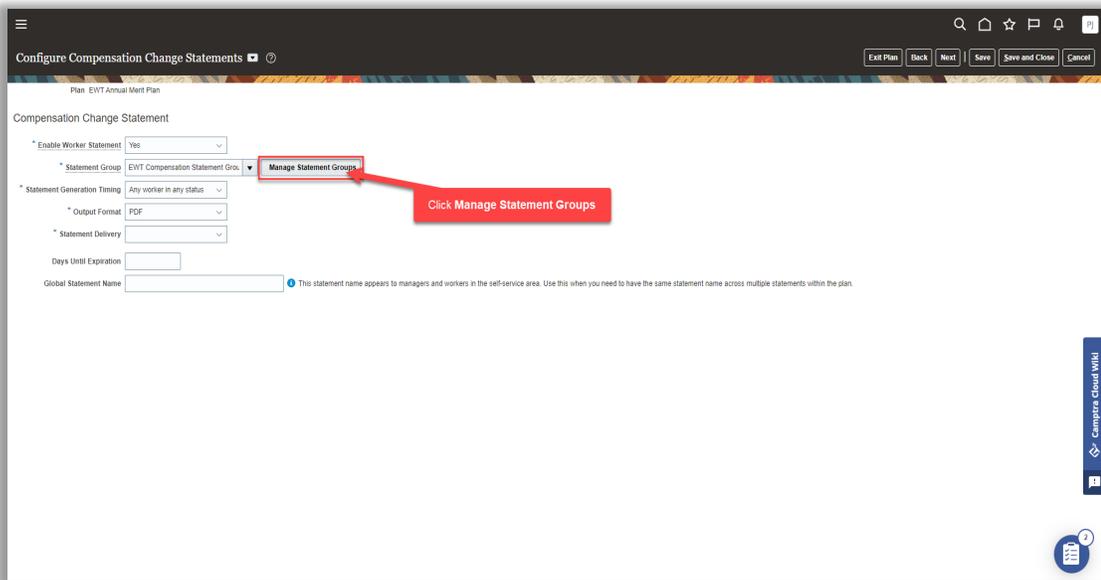
Select the Plan



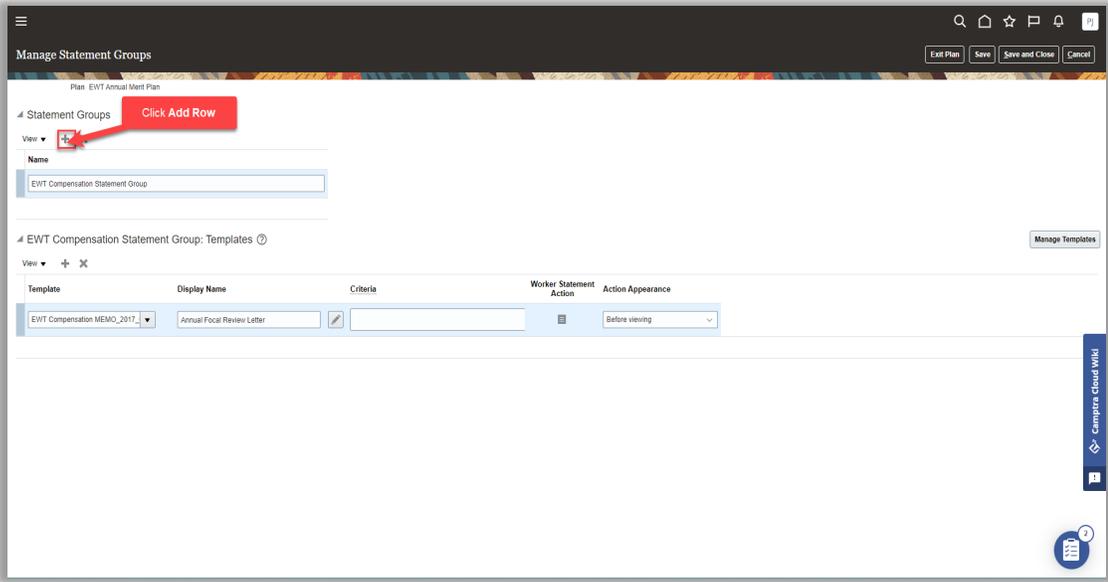
Expand Configure Worksheets and click Compensation Change Statements



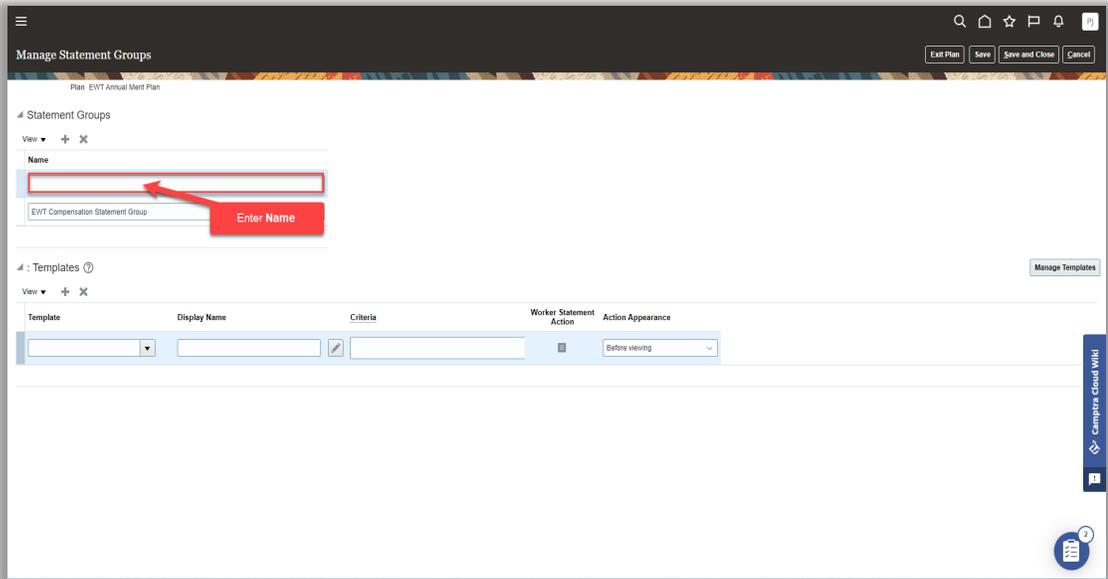
Click **Manage Statement Groups**



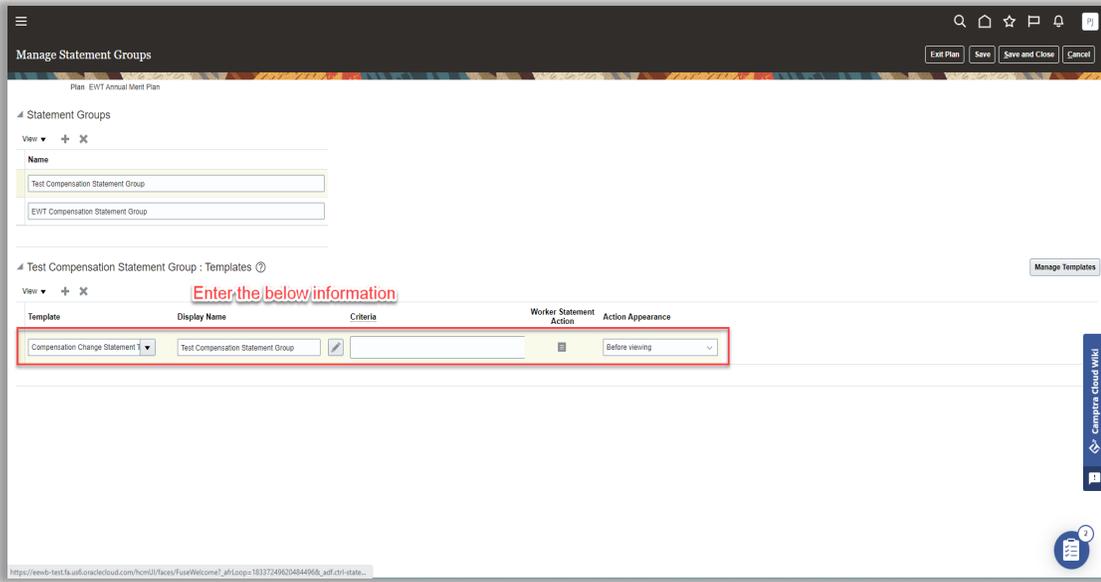
Here we can manage the **Statement Groups** and manage the **Compensation Statement Group Templates**. First, we can enter **Statement Groups**. Click **Add Row**



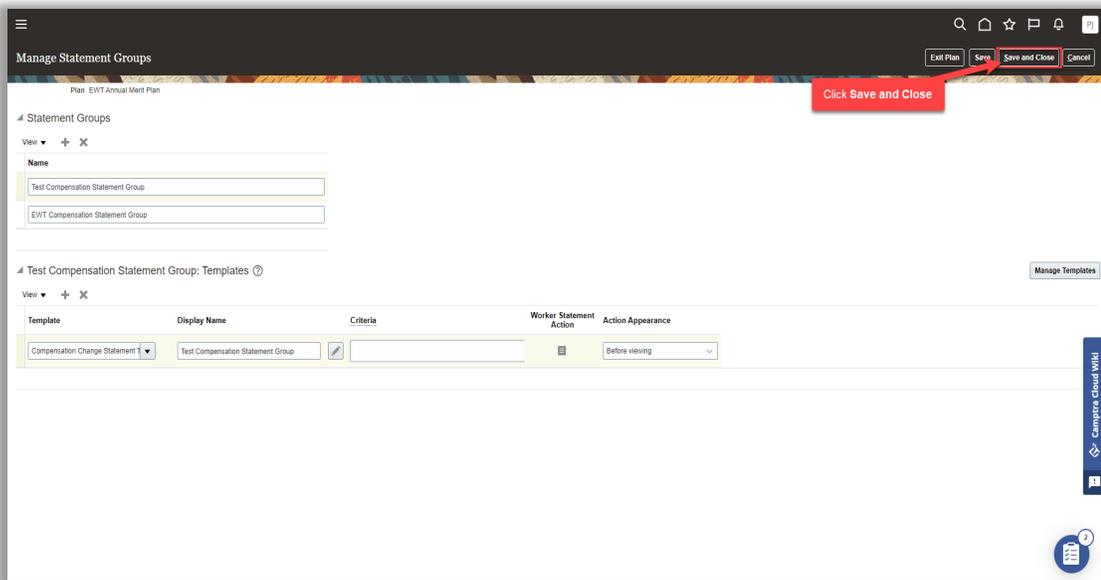
Enter the Name



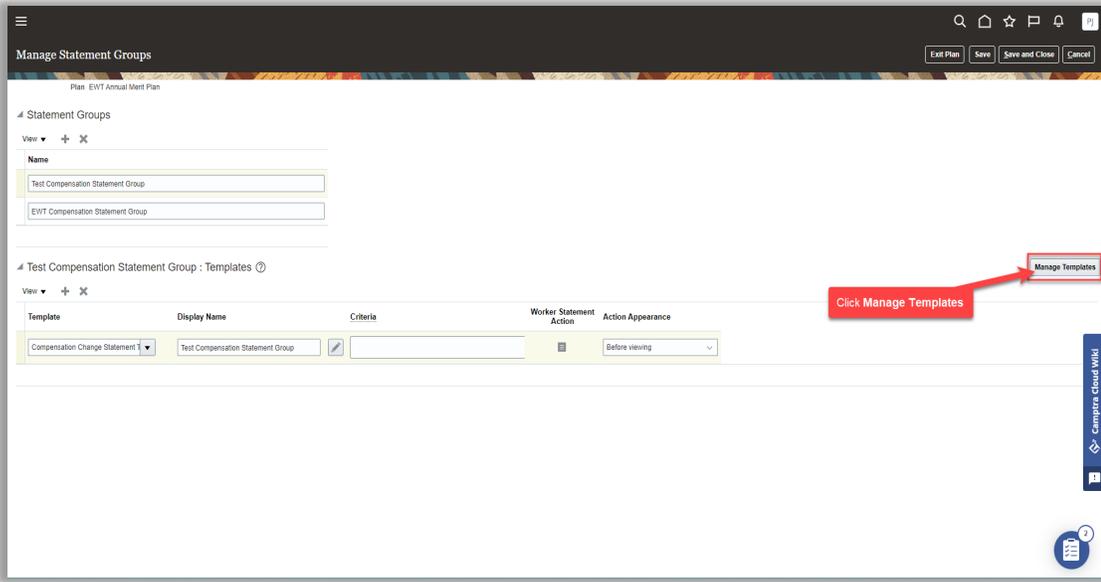
Next, under **Test Compensation Statement Group : Templates**, enter the information



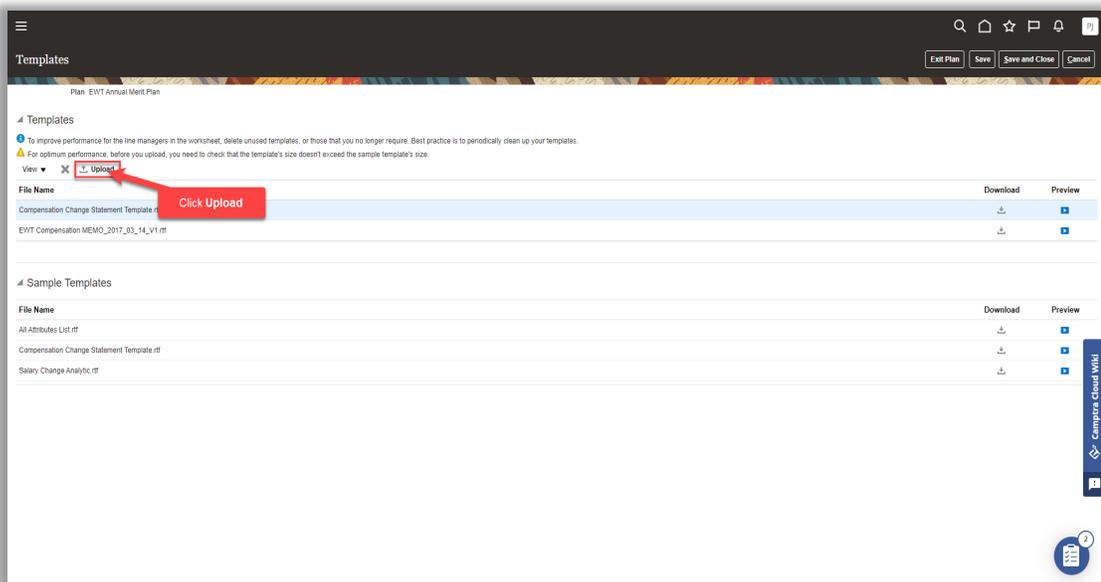
Click Save and Close



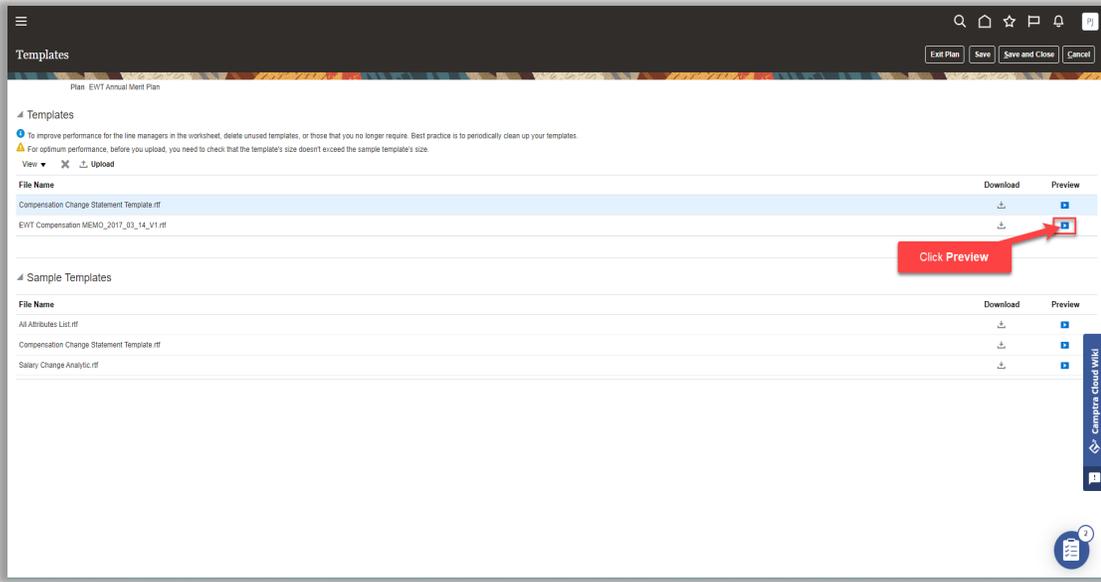
To add a new template to the Statement Group, click Manage Templates



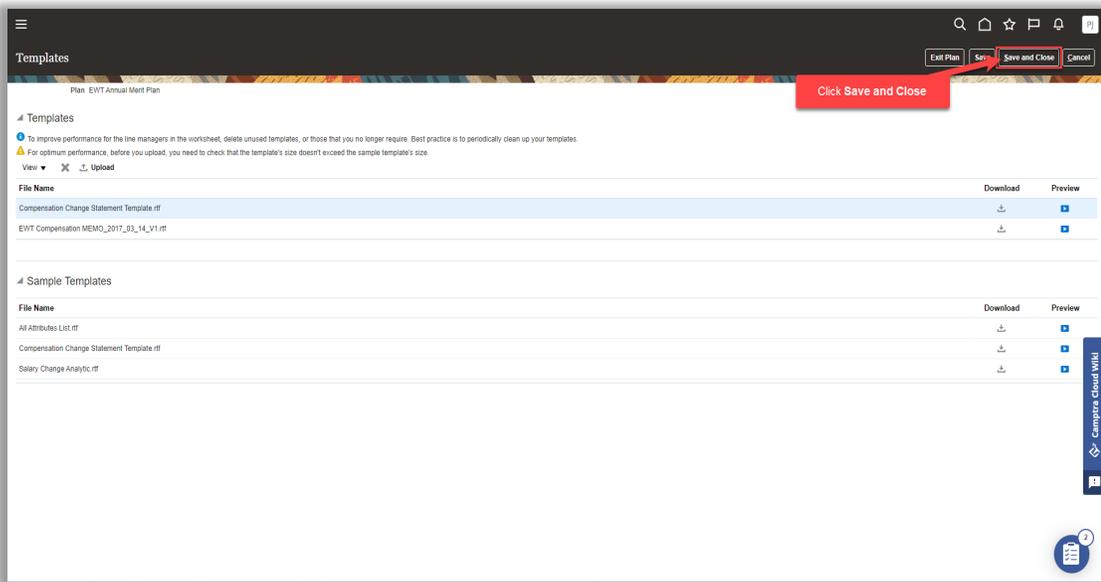
In this screen, we can manage the existing templates or **Upload** a new template. Click **Upload** to upload a new template



We can also Preview the templates by clicking **Preview**



Once we have completed the management of the templates, click **Save and Close**

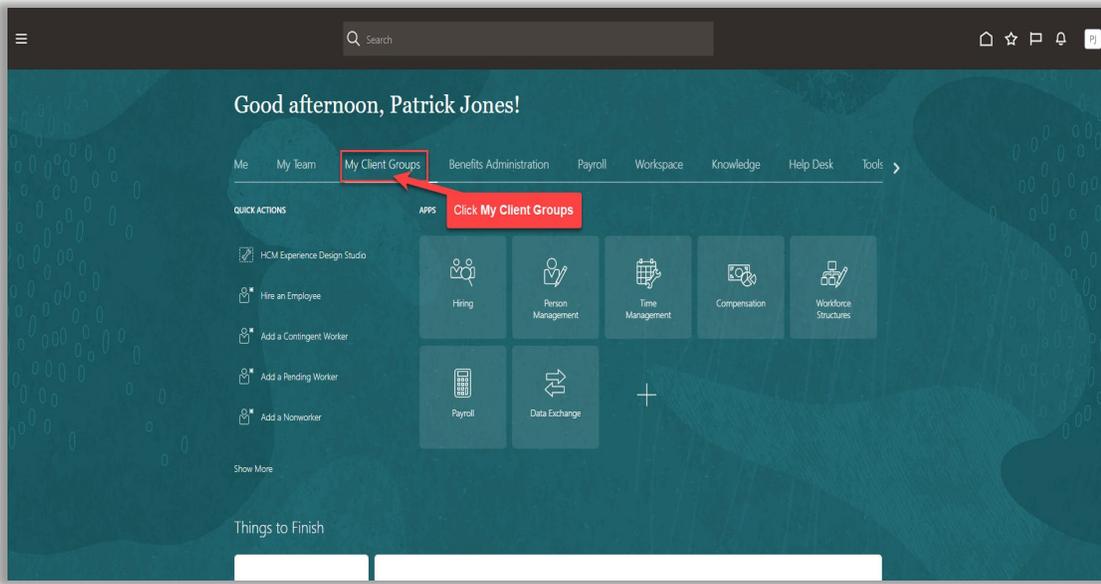


Workforce Go Live

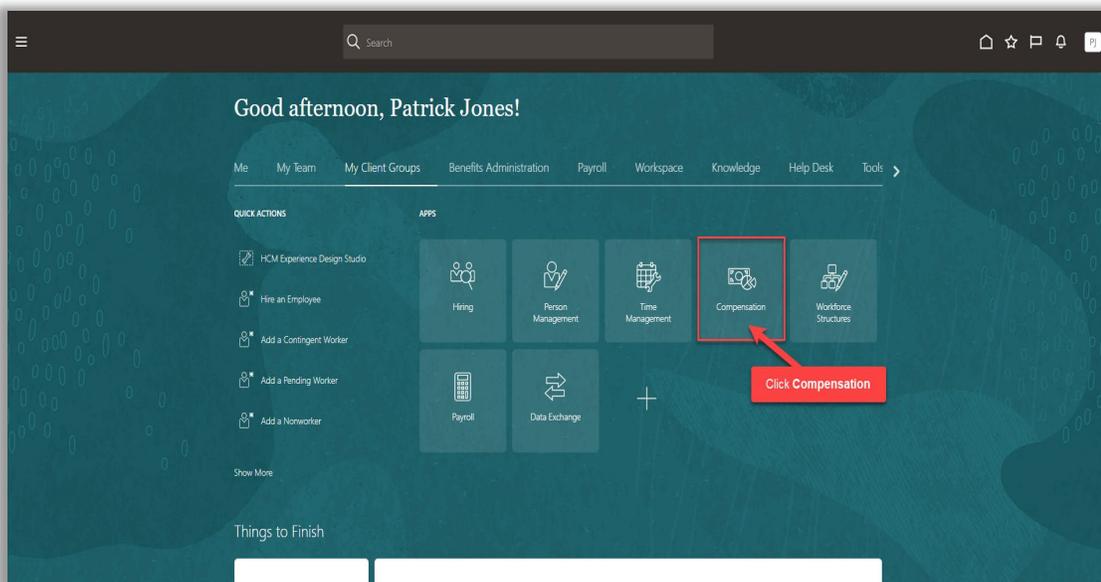
Start Workforce Compensation Cycle

Navigation: Home>My Client Groups>Compensation>Workforce Compensation Plans>Select Plan>Validate Plan and Start Compensation Cycle>Enter or Update Information>Save and Close

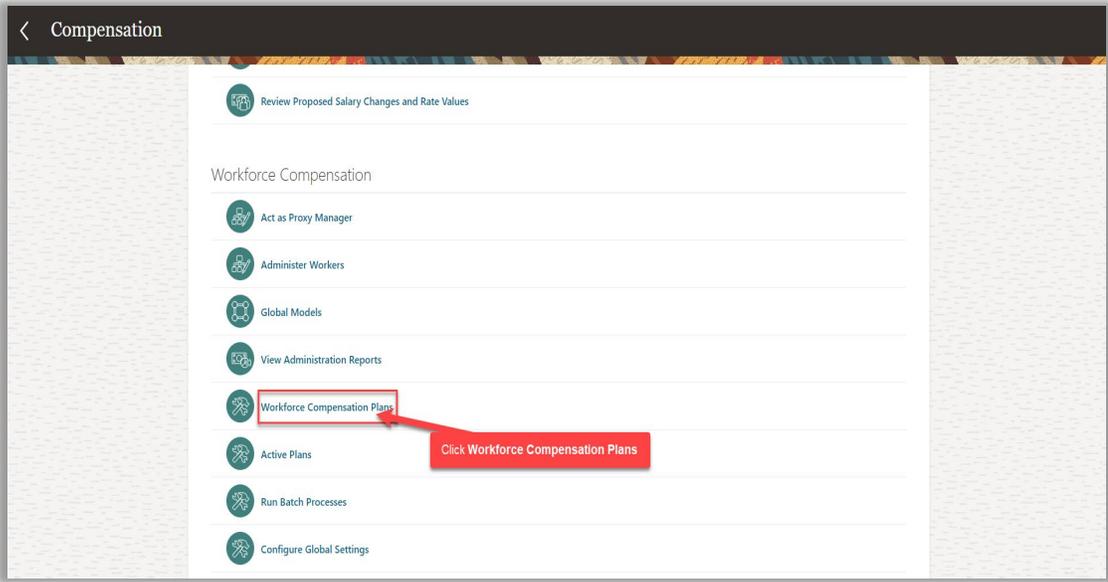
From the home screen, click **My Client Groups**



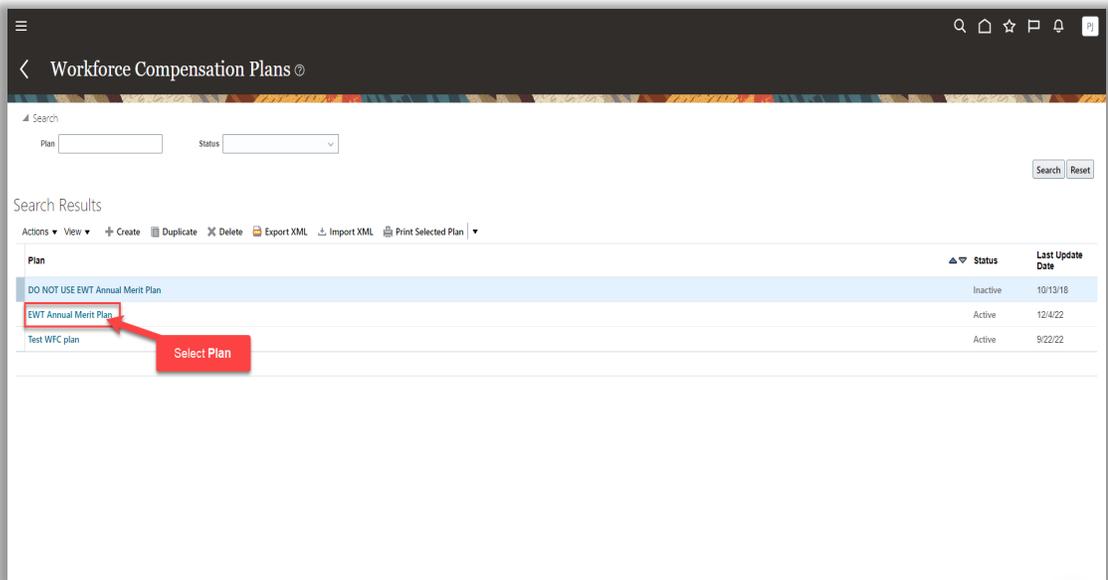
Next, click **Compensation**



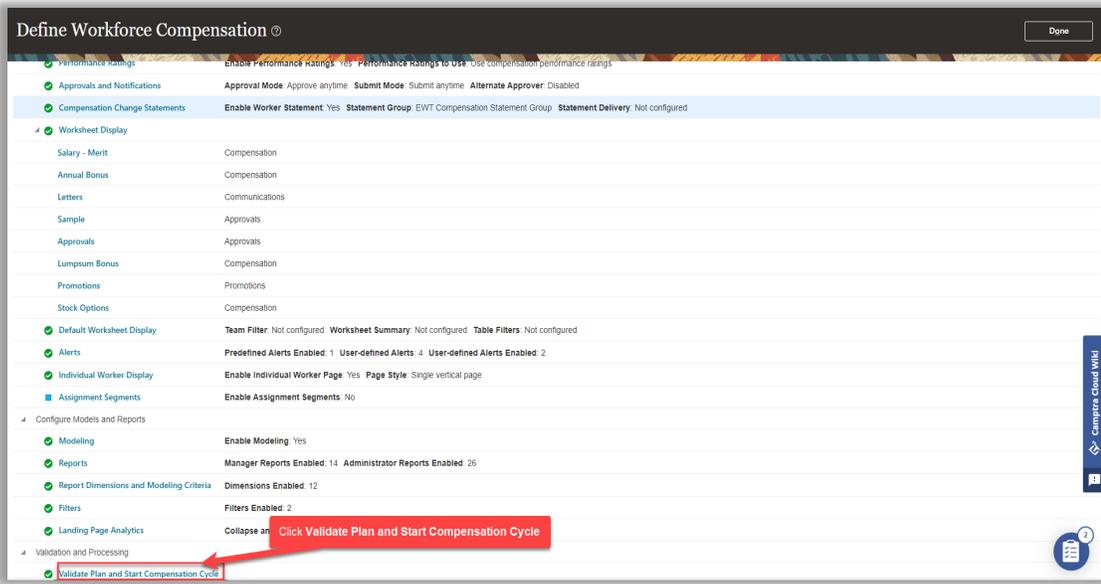
Under **Workforce Compensation**, click **Workforce Compensation Plans**. We can also search for **Workforce Compensation Plans** using the search bar on the top left of the page



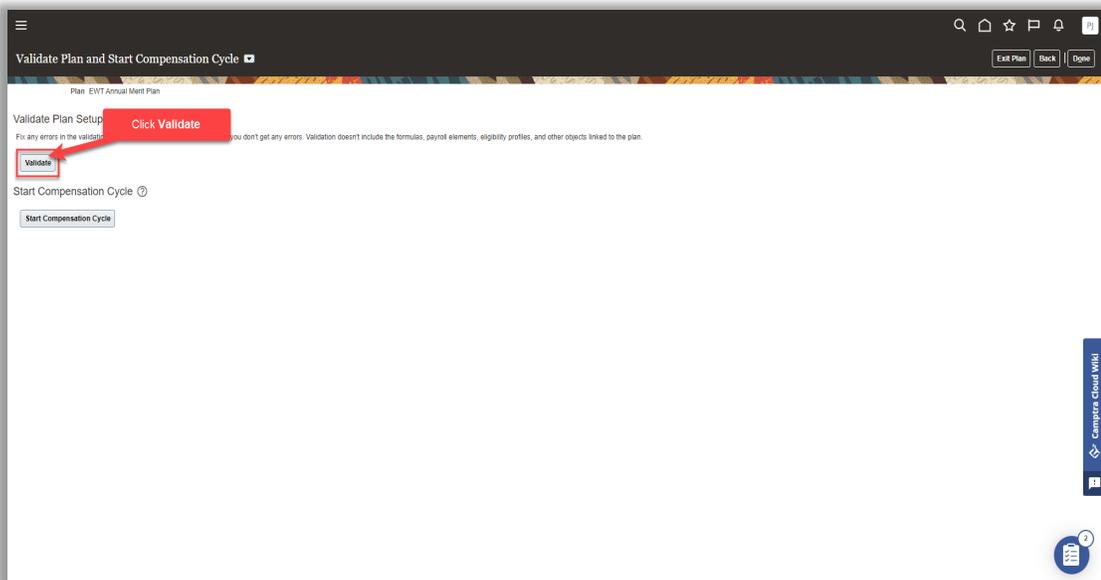
Select the Plan



Expand **Validation and Processing** and click **Validate Plan and Start Compensation Cycle**



First, we need to Validate the Plan Setup. Click **Validate**



In this screen, we can review the **Validation Results**. We can view **Messages**, **Details**, and the **Type of Alerts**

Validation Results

Plan EVT Annual Merit Plan

We can review the below information to Validate the Plan

Message	Details	Type
Verify that all dynamic calculations and alerts are enabled only if necessary	The number of conditions defined with the start process triggering event enabled: 19 The number of conditions defined with the refresh process triggering event enabled: 19 The number of conditions with the worksheet change triggering event enabled: 19 Use the worksheet change triggering event only when the dynamic calculation or alert must be evaluated when managers change worksheet data. An excessive number of triggering events may negatively impact worksheet and batch process performance.	●
Budget pool Lumpsum Bonus Budget is a monetary pool that's being stored as amounts	Published budget amounts won't automatically readjust when workers are reassigned between worksheets or the eligible population of workers changes. Store budgets as percentages if you want published budgets to readjust automatically.	▲
More than 1 task using the approval page type is enabled	The worksheet will display duplicate approval tasks which display the same content. Do you want to continue?	▲
The compensation amount column for the component Stocks is enabled but no elements are mapped to it or it isn't selected to be posted as salary	Unless the component represents equity, map an element to the component Stocks or designate the column to be posted as salary, or the component won't be processed.	▲
You need to provide a value for at least 1 of the default value fields for each column because you enabled default value subject to refresh	These are the affected columns: (Management Level)	▲
You configured 4 columns using fast formulas to set the default values.	4	●

Empower Cloud Wiki

Next, click Done

Validation Results

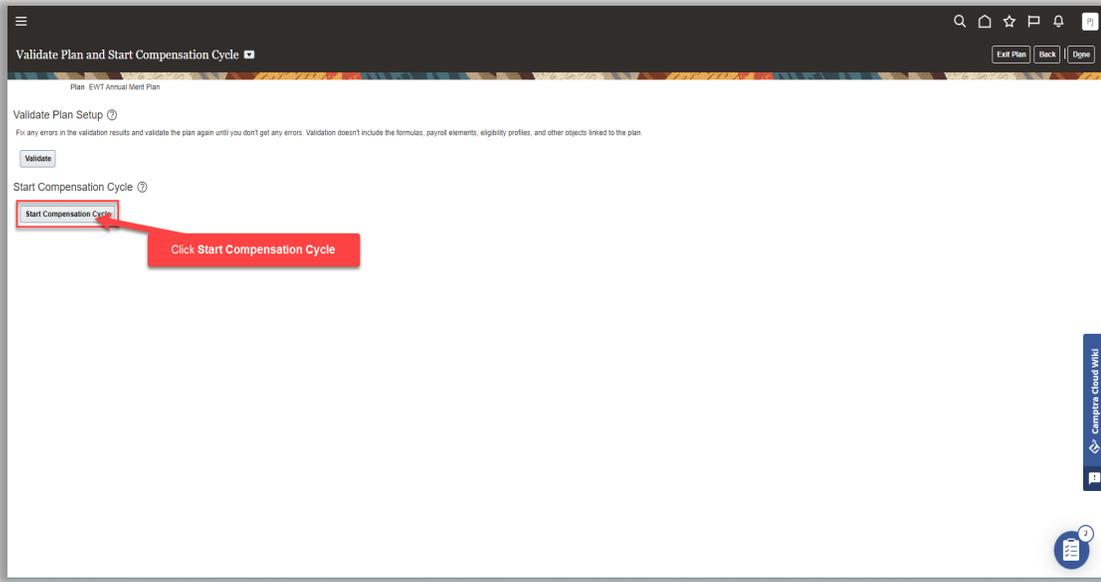
Plan EVT Annual Merit Plan

Click Done

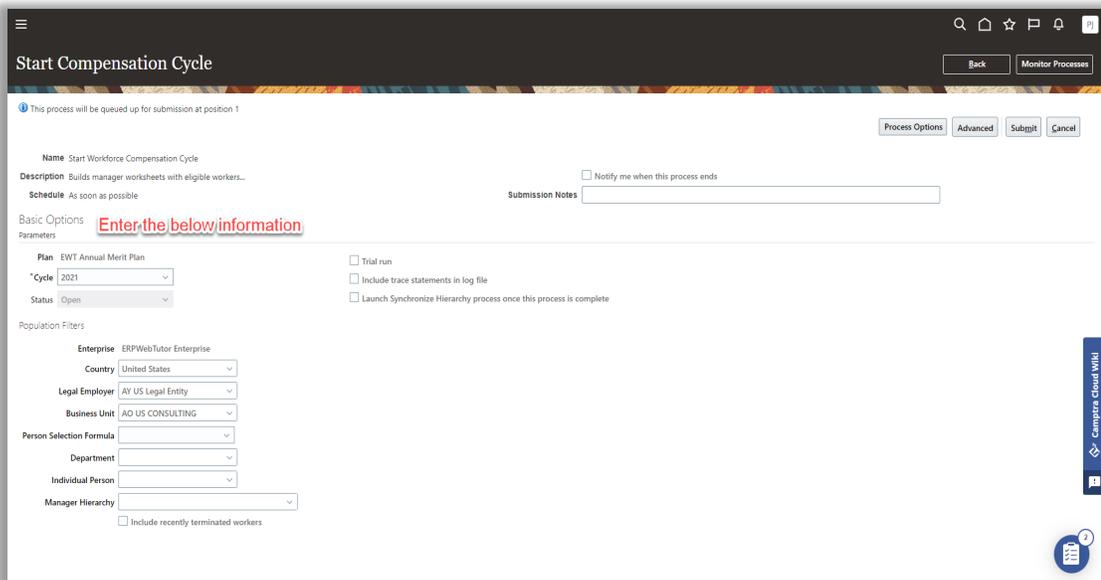
Message	Details	Type
Verify that all dynamic calculations and alerts are enabled only if necessary	The number of conditions defined with the start process triggering event enabled: 19 The number of conditions defined with the refresh process triggering event enabled: 19 The number of conditions with the worksheet change triggering event enabled: 19 Use the worksheet change triggering event only when the dynamic calculation or alert must be evaluated when managers change worksheet data. An excessive number of triggering events may negatively impact worksheet and batch process performance.	●
Budget pool Lumpsum Bonus Budget is a monetary pool that's being stored as amounts	Published budget amounts won't automatically readjust when workers are reassigned between worksheets or the eligible population of workers changes. Store budgets as percentages if you want published budgets to readjust automatically.	▲
More than 1 task using the approval page type is enabled	The worksheet will display duplicate approval tasks which display the same content. Do you want to continue?	▲
The compensation amount column for the component Stocks is enabled but no elements are mapped to it or it isn't selected to be posted as salary	Unless the component represents equity, map an element to the component Stocks or designate the column to be posted as salary, or the component won't be processed.	▲
You need to provide a value for at least 1 of the default value fields for each column because you enabled default value subject to refresh	These are the affected columns: (Management Level)	▲
You configured 4 columns using fast formulas to set the default values.	4	●

Empower Cloud Wiki

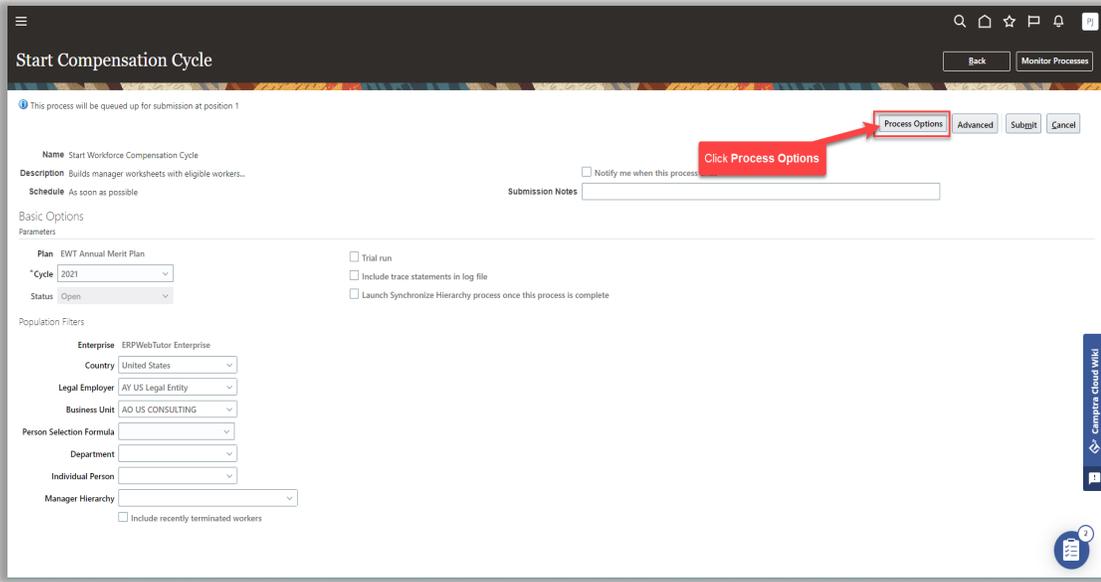
Next, we can Start Compensation Cycle. Click Start Compensation Cycle



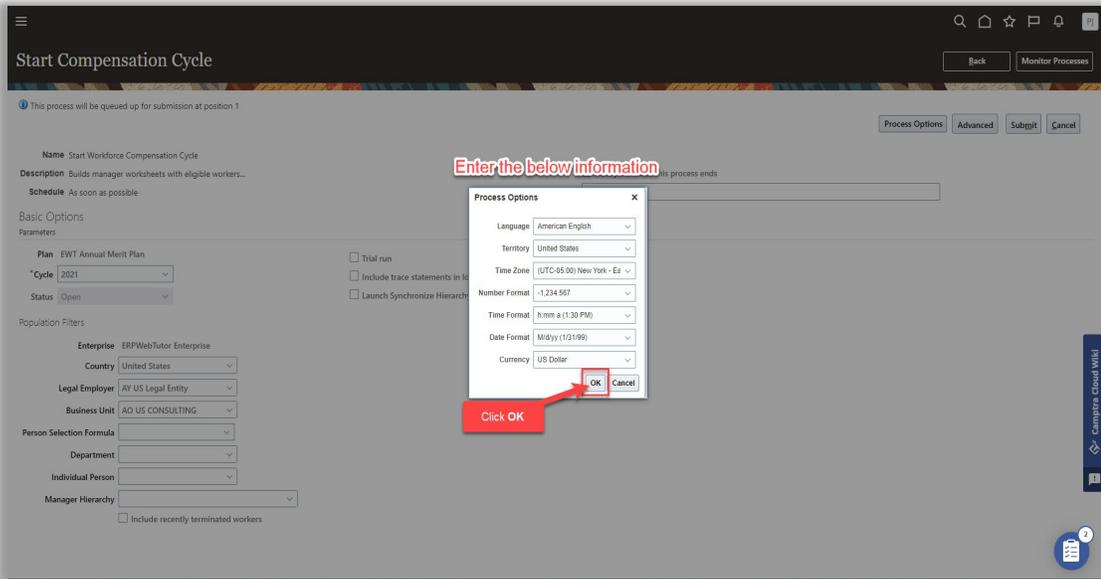
Enter the **Basic Options** information



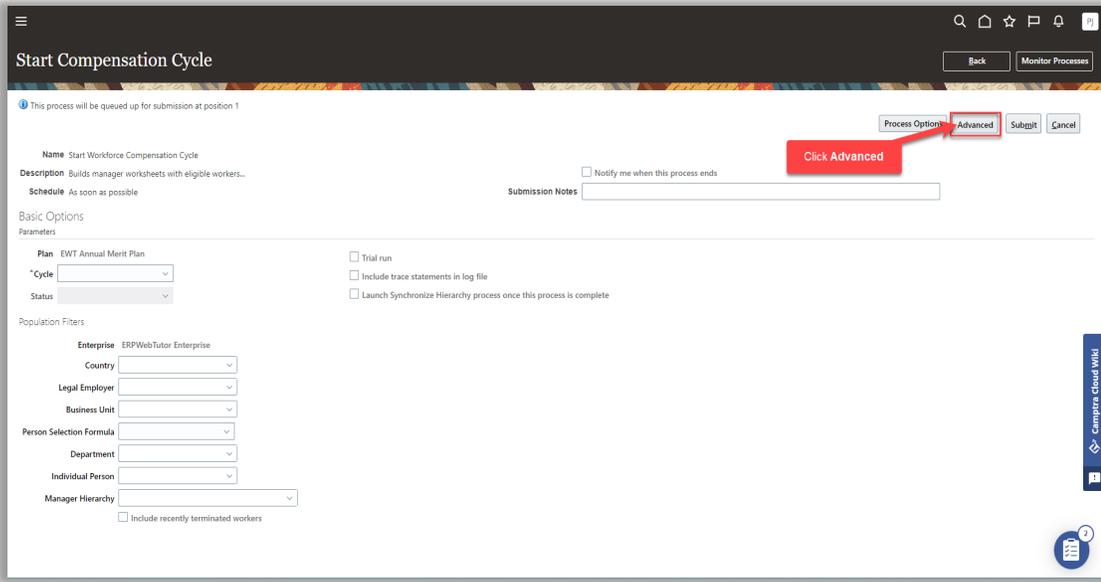
Next, we can enter the **Process Options**. Click **Process Options**



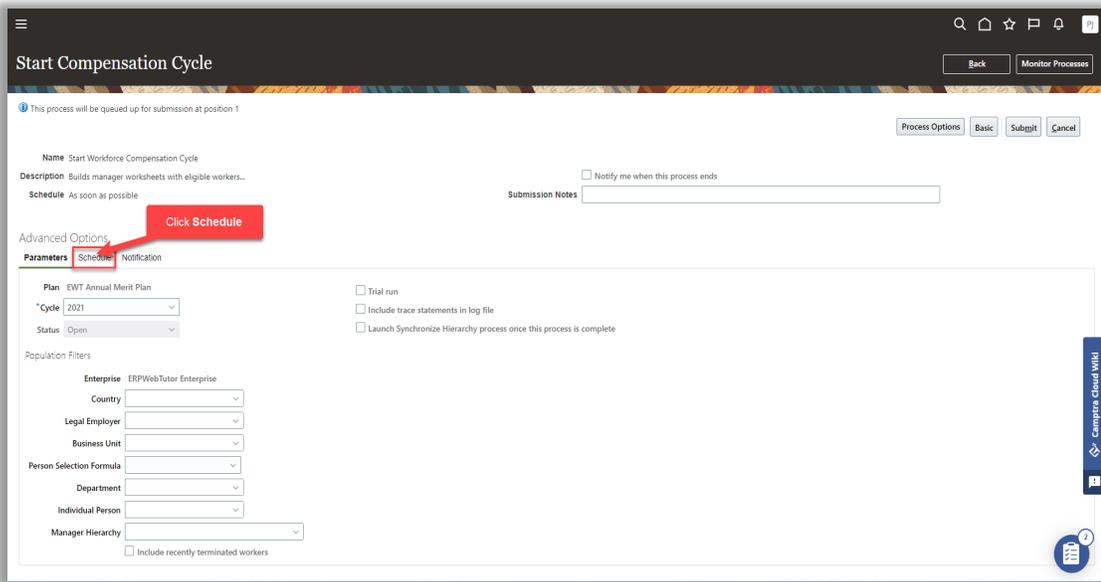
Enter the **Process Options** and click **OK**



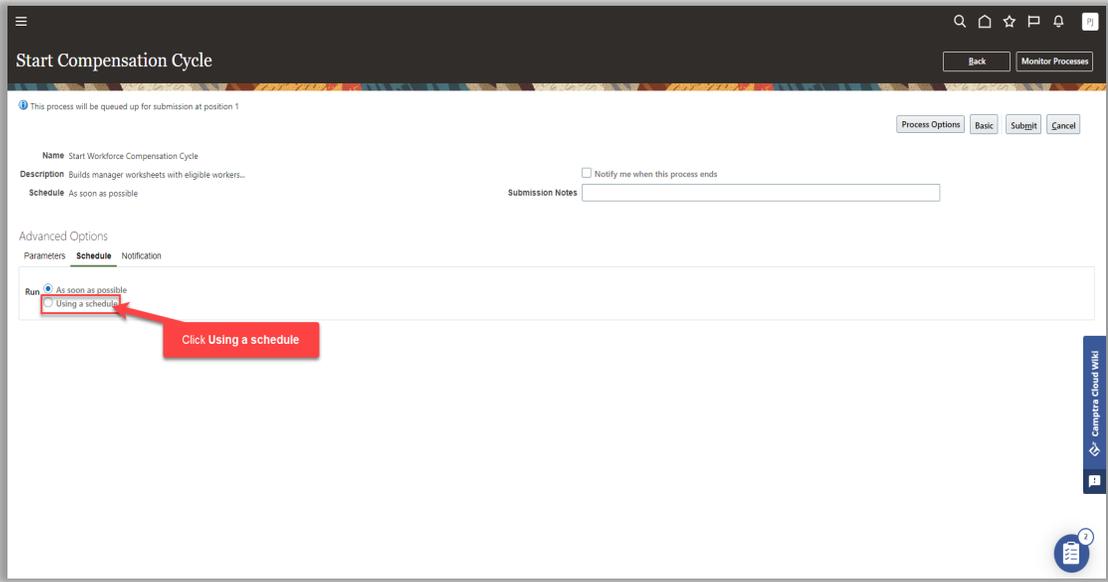
Next, we can set **Advanced Options**. Click **Advanced**



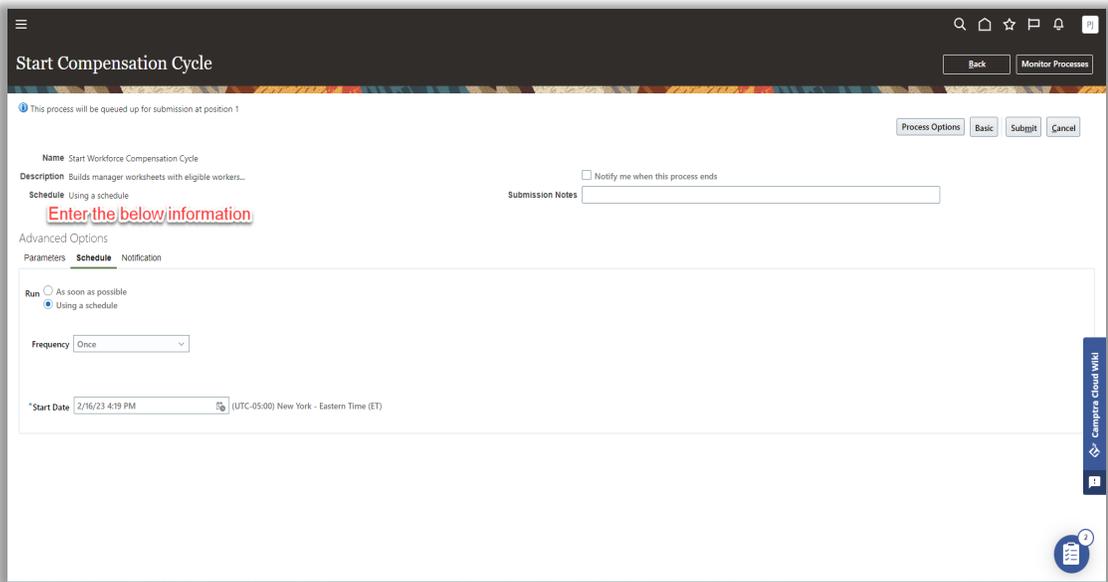
In the screen we can enter the Advanced Parameters, Schedule or Notification. Click Schedule



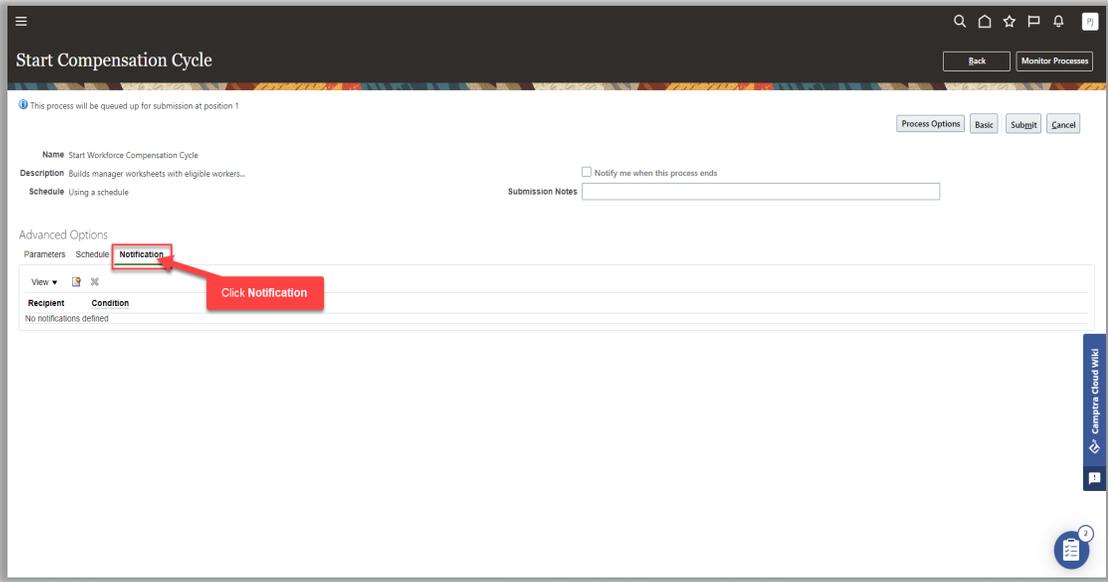
We have two options here. We can Run As soon as possible or Using a schedule. Click Using a schedule



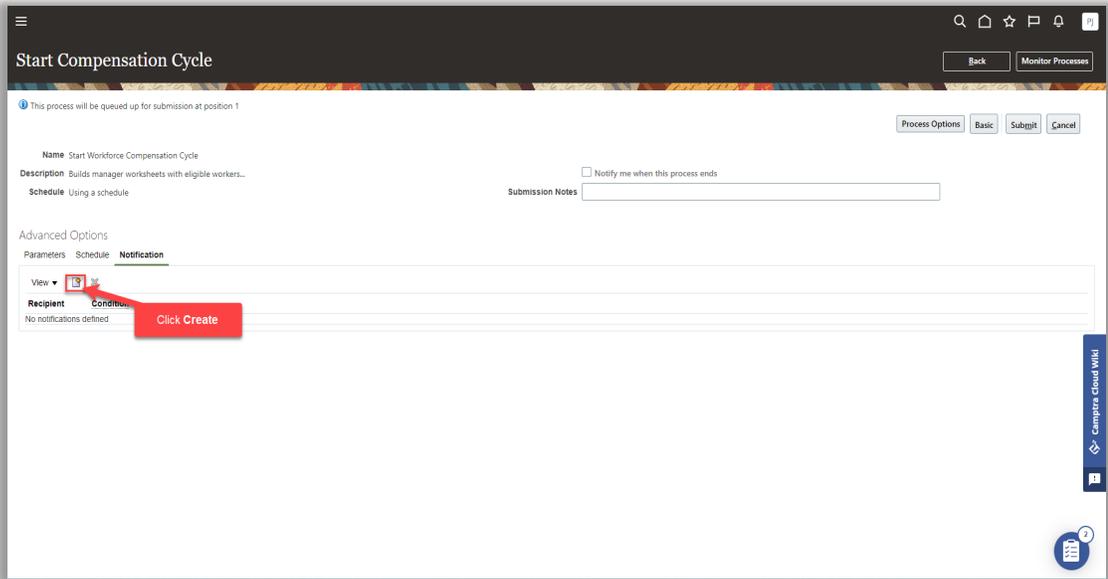
Enter the **Schedule** information



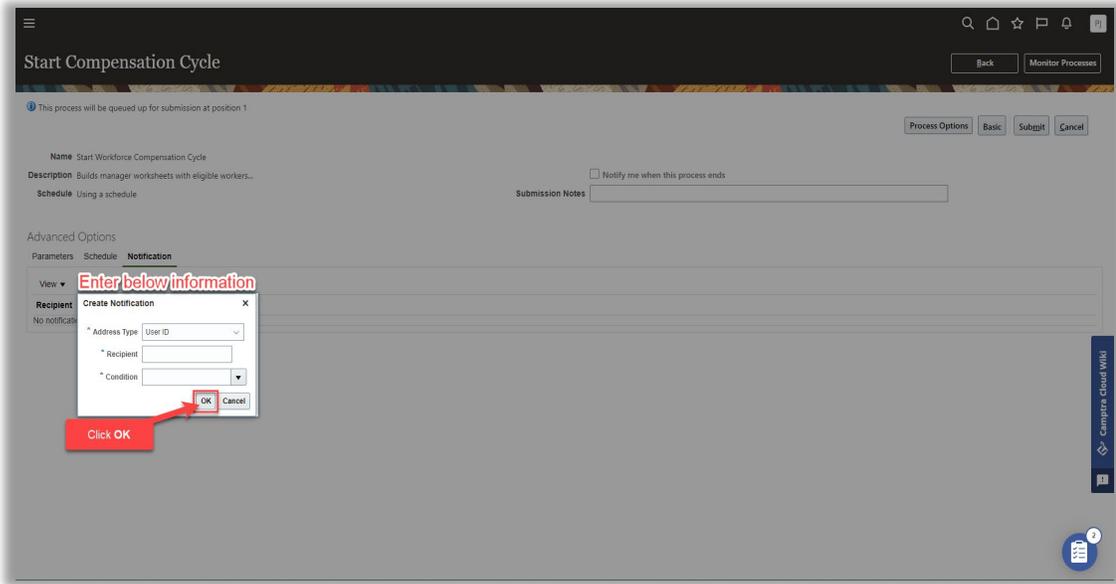
Next, click **Notification**



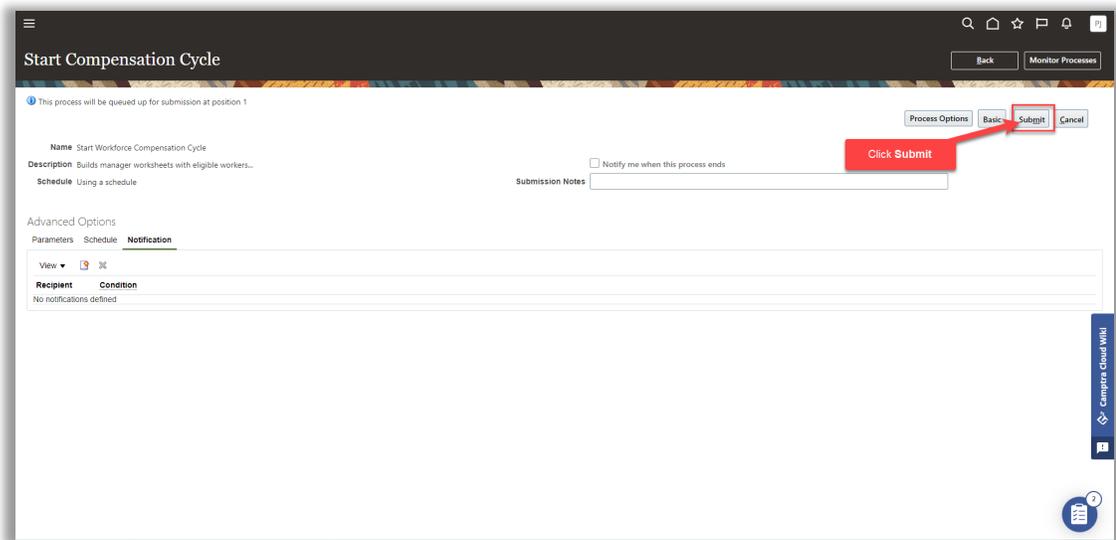
To create a Notification, click **Create**



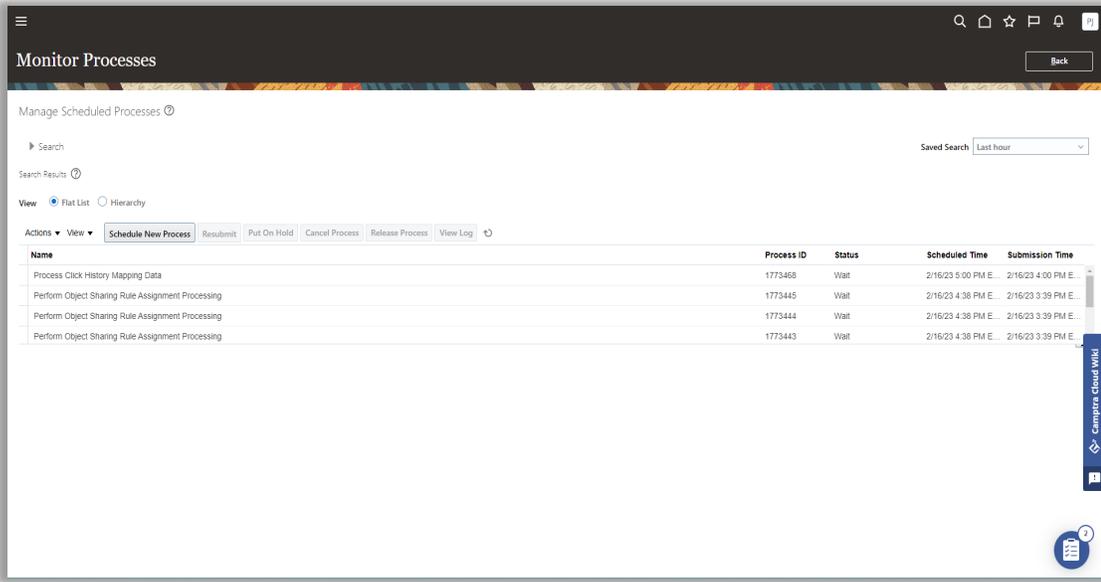
Enter the **Create Notification** information and click **OK**



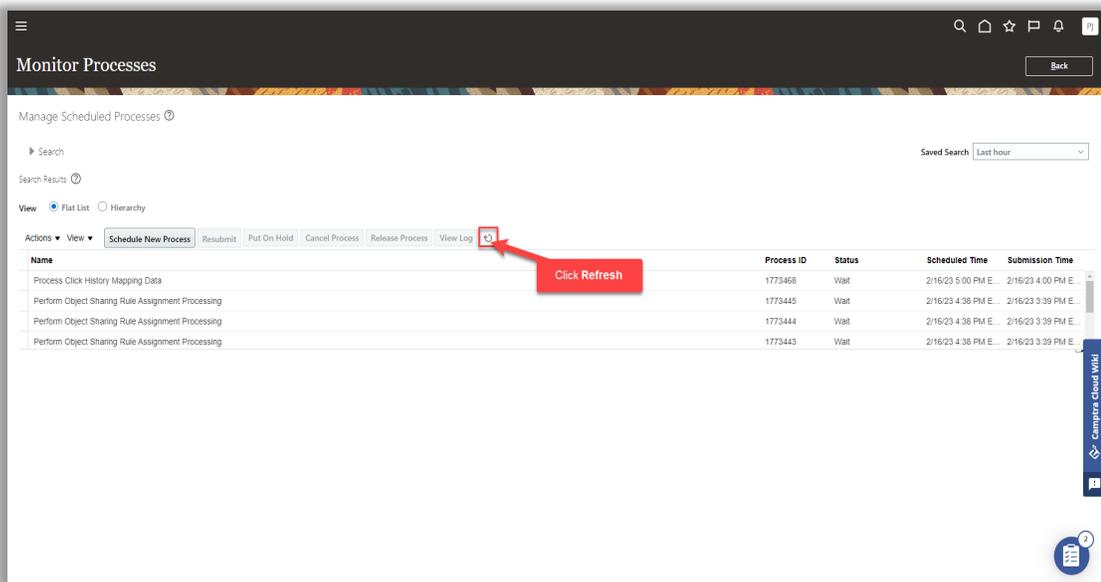
Once complete, click **Submit**



Lastly, we can monitor the process. Click **Monitor Process**



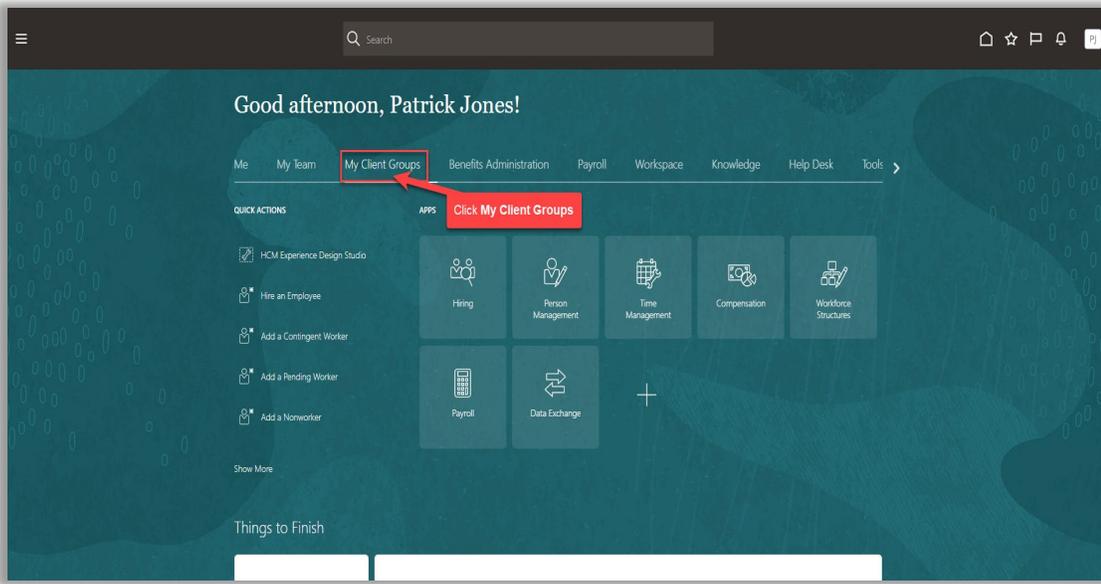
Here we can monitor the **Start Compensation Cycle Process**. We can click **Refresh** to refresh the process



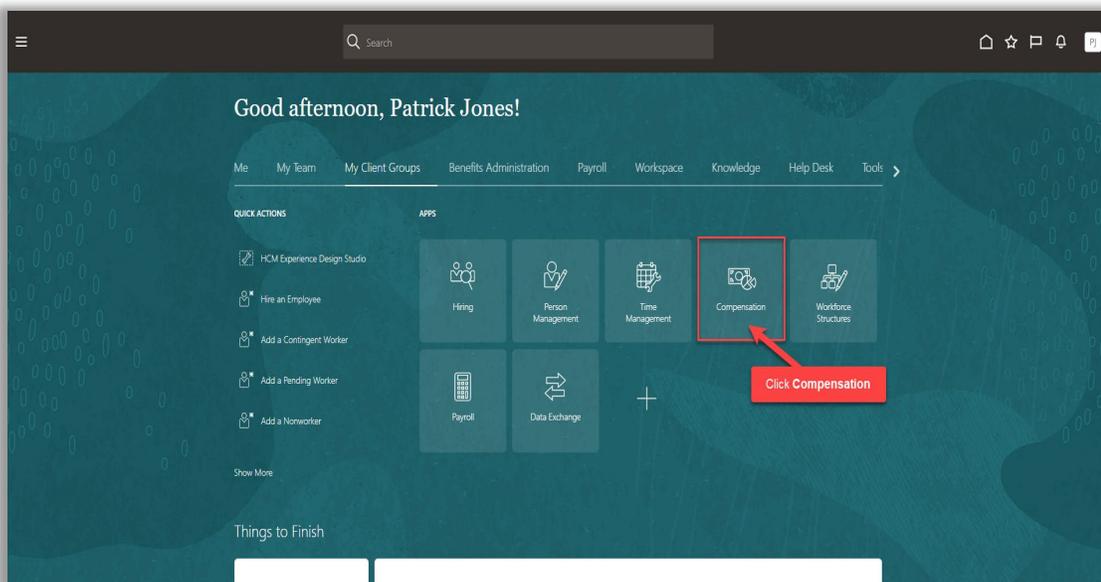
Notify Managers Plan Cycle Is Opened Or Closed

Navigation: Home>My Client Groups>Compensation>Run Batch Processes>Run Across From Notify Managers That Cycle Is Open>Enter Information>Submit

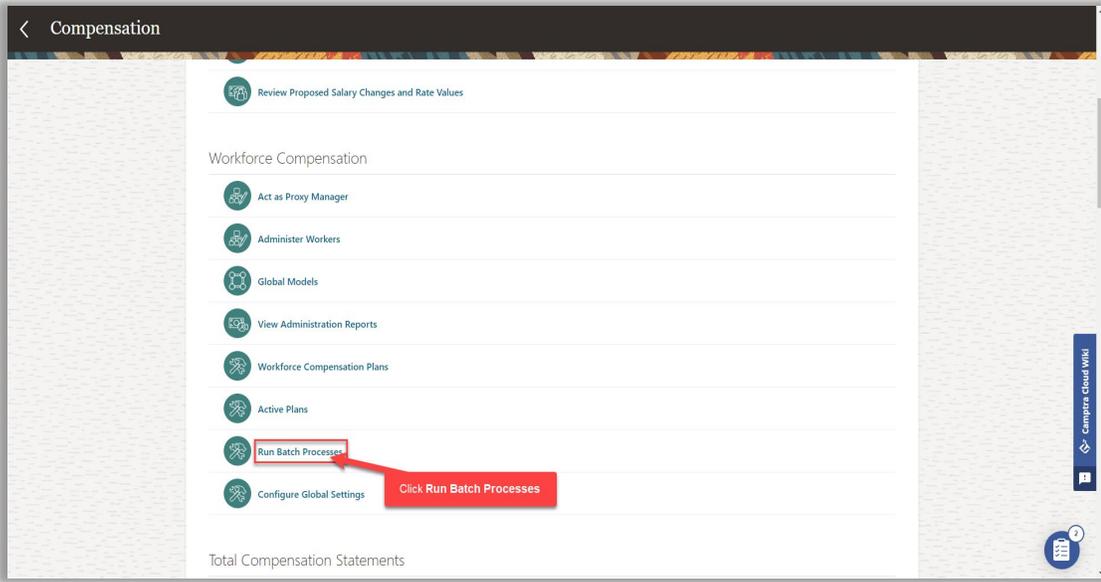
From the home screen, click **My Client Groups**



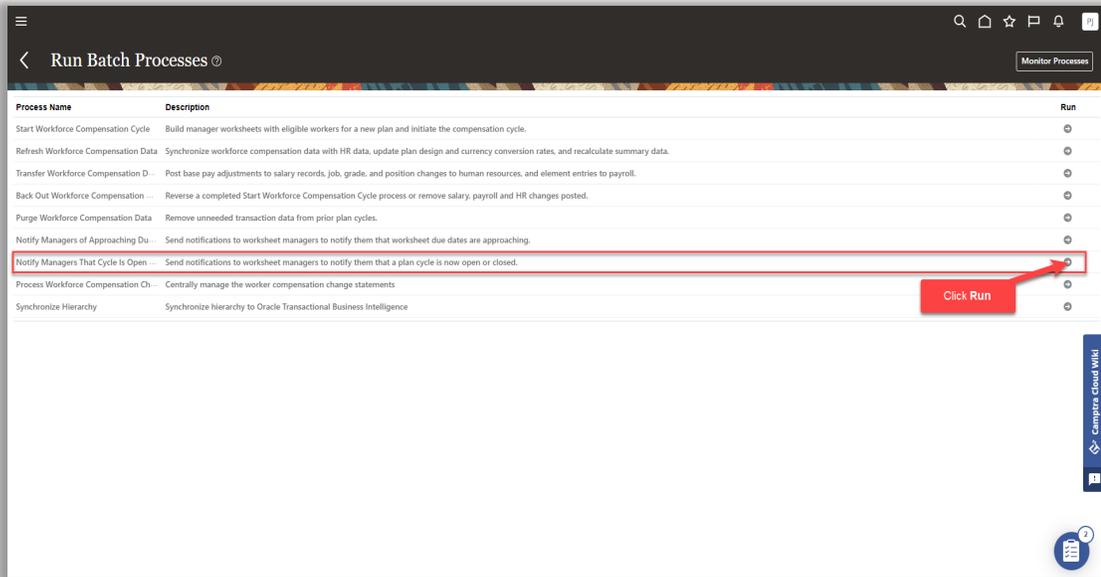
Next, click **Compensation**



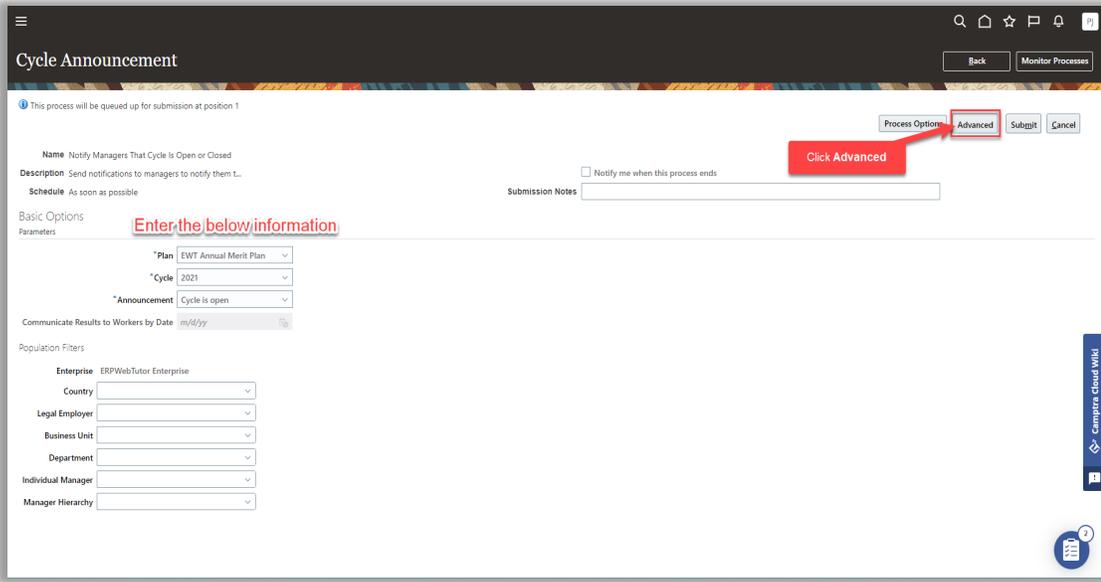
Under **Workforce Compensation**, click **Run Batch Processes**. We can also search for **Run Batch Processes** using the search bar on the top left of the page



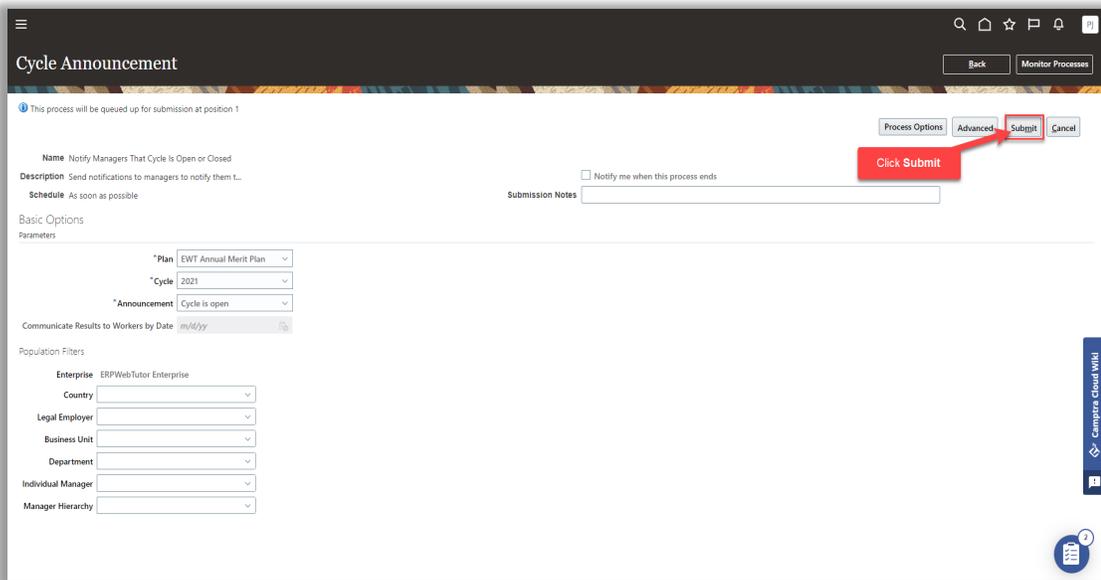
Across from Notify Managers That Cycle Is Open, click Run



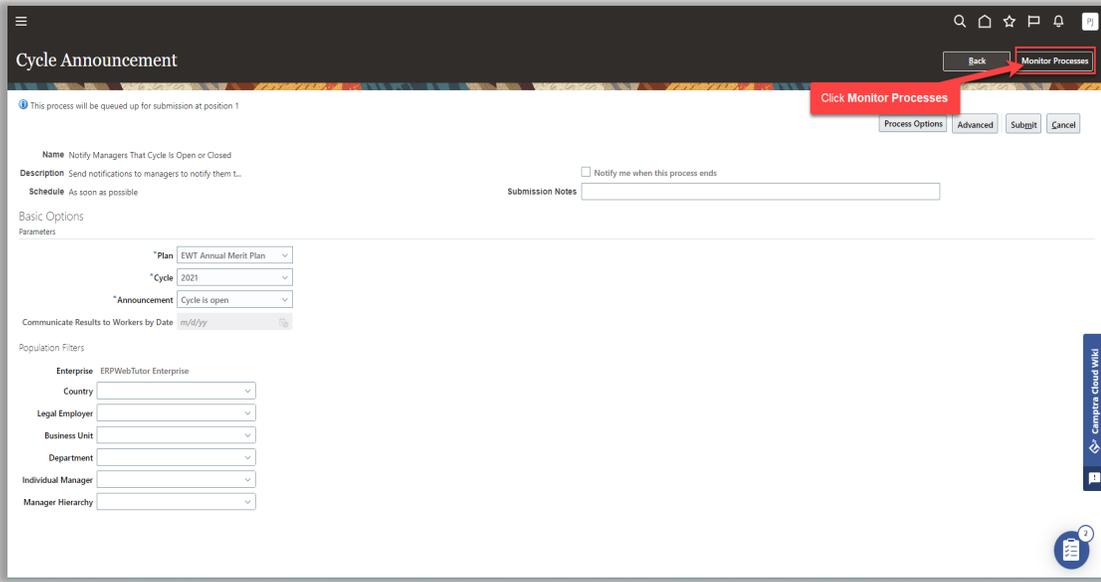
Enter the **Basic Options** information and if needed, we can click **Advanced** to enter Advanced criteria



Once the information is entered, click **Submit**



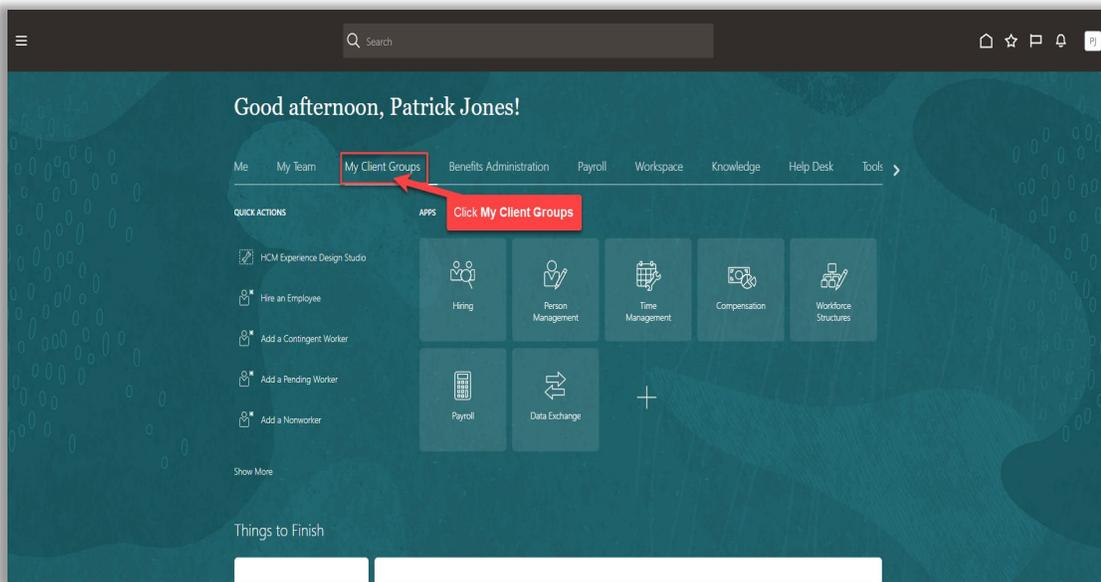
Click **Monitor Processes** to check the status of the process



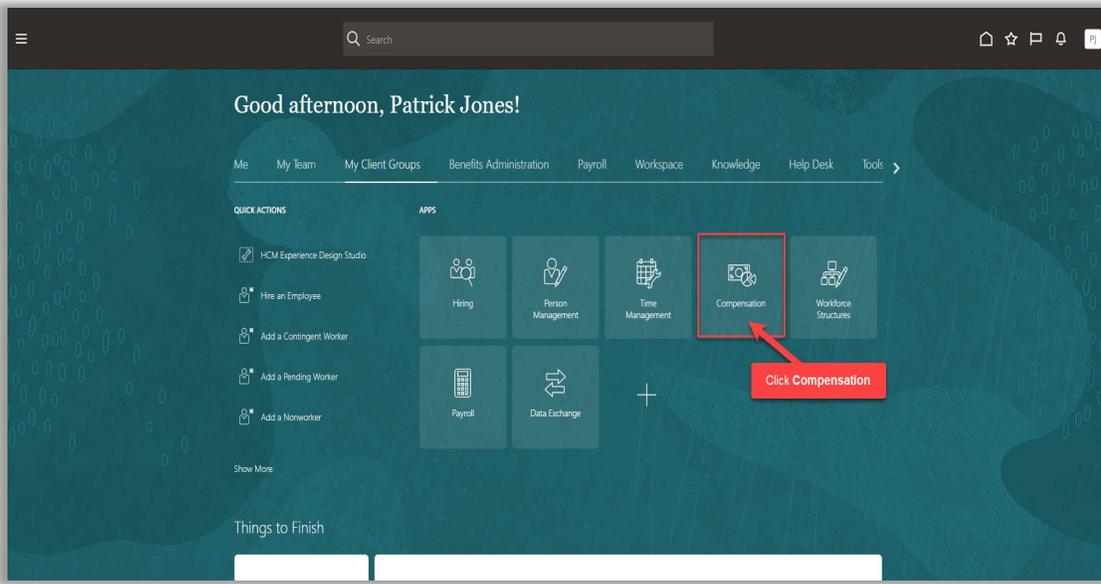
Notify Managers Of Approaching Due Dates

Navigation: Home>My Client Groups>Compensation>Run Batch Processes>Run Across From Notify Managers Of Approaching Due Dates>Enter Information>Submit

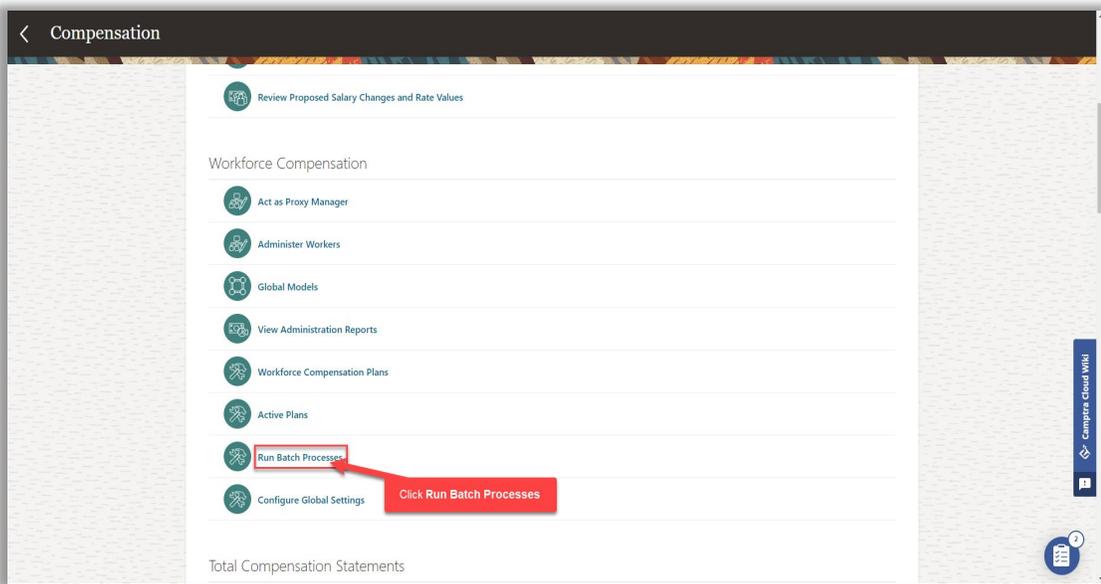
From the home screen, click **My Client Groups**



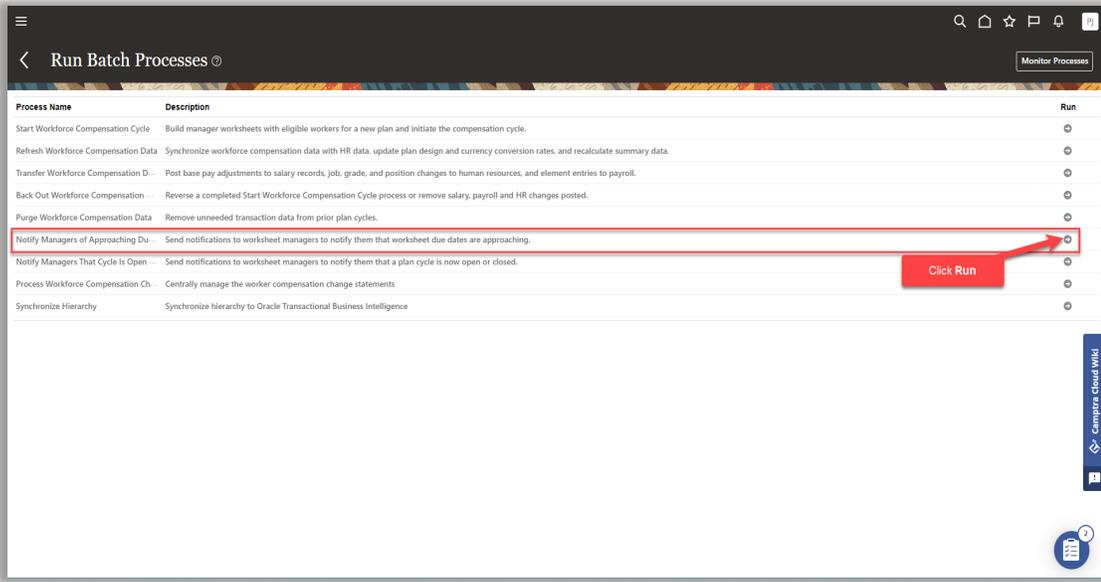
Next, click **Compensation**



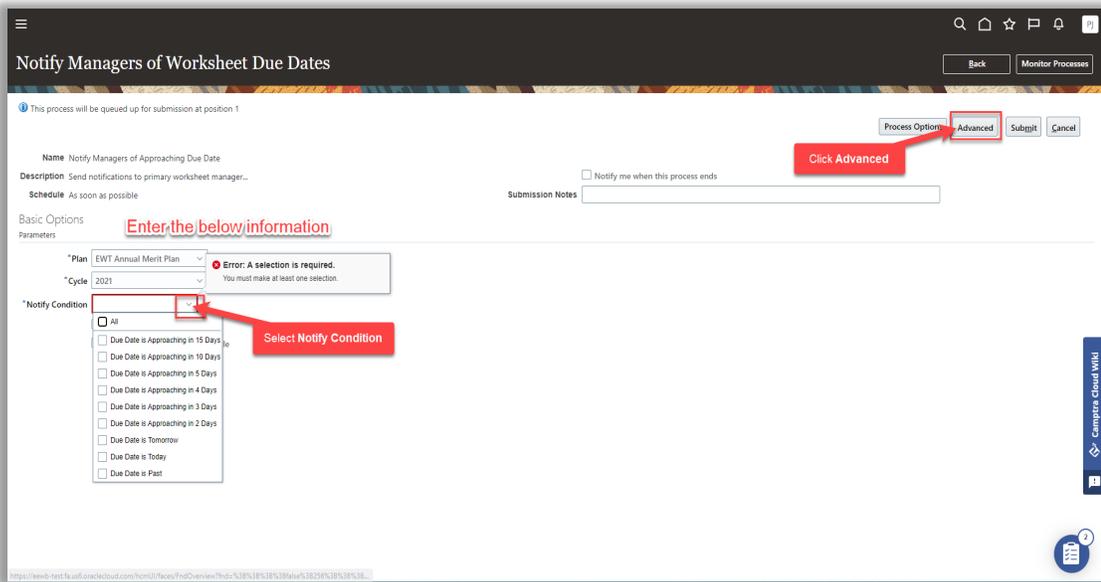
Under **Workforce Compensation**, click **Run Batch Processes**. We can also search for **Run Batch Processes** using the search bar on the top left of the page



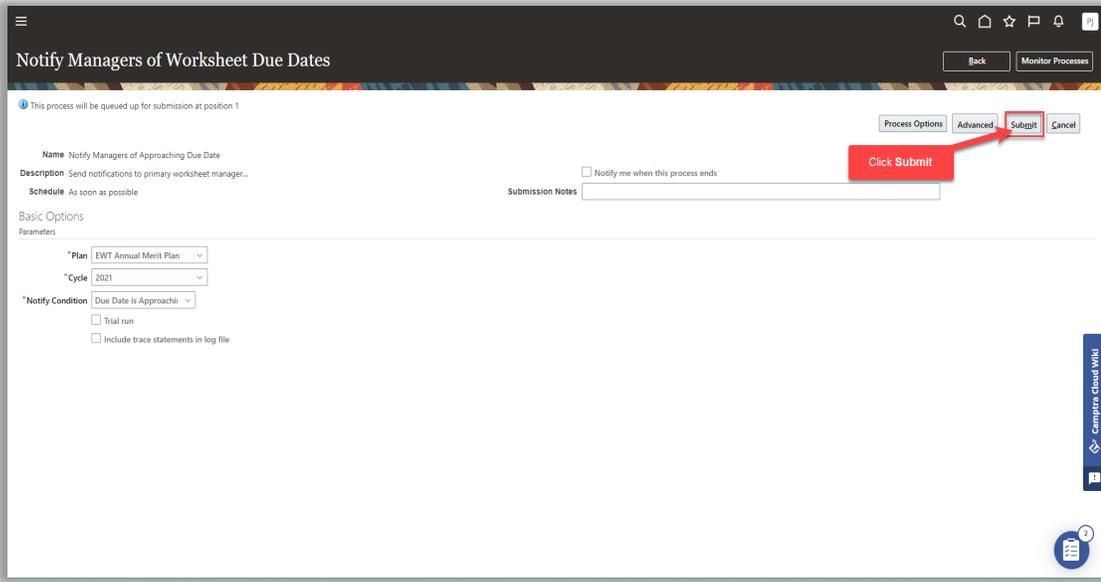
Across from **Notify Managers Of Approaching Due Dates**, click **Run**



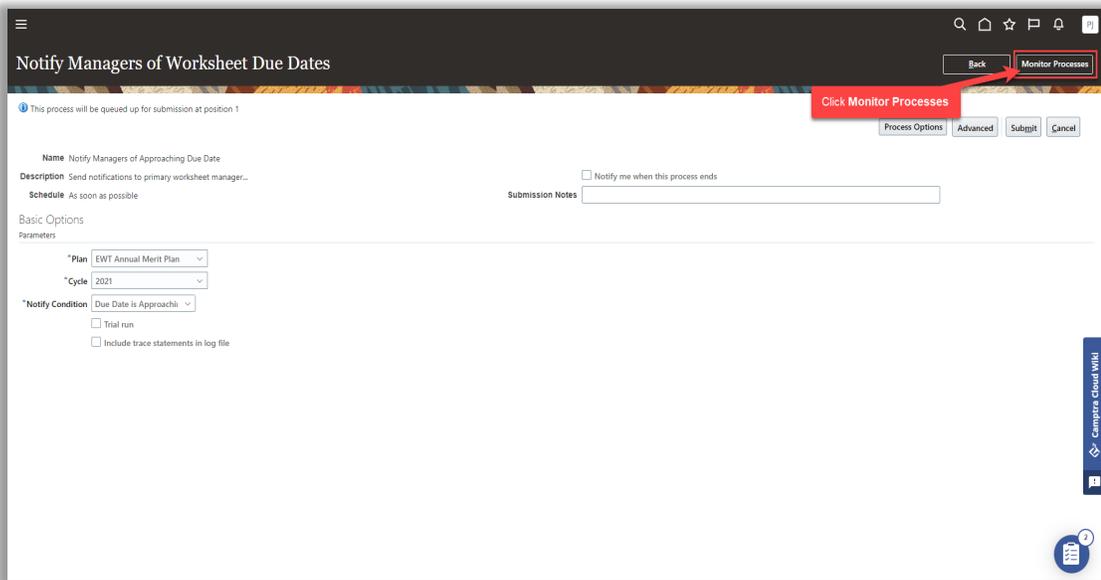
Enter the **Basic Options** information and if needed, we can click **Advanced** to enter Advanced criteria



Once the information is entered, click **Submit**



Click **Monitor Processes** to check the status of the process

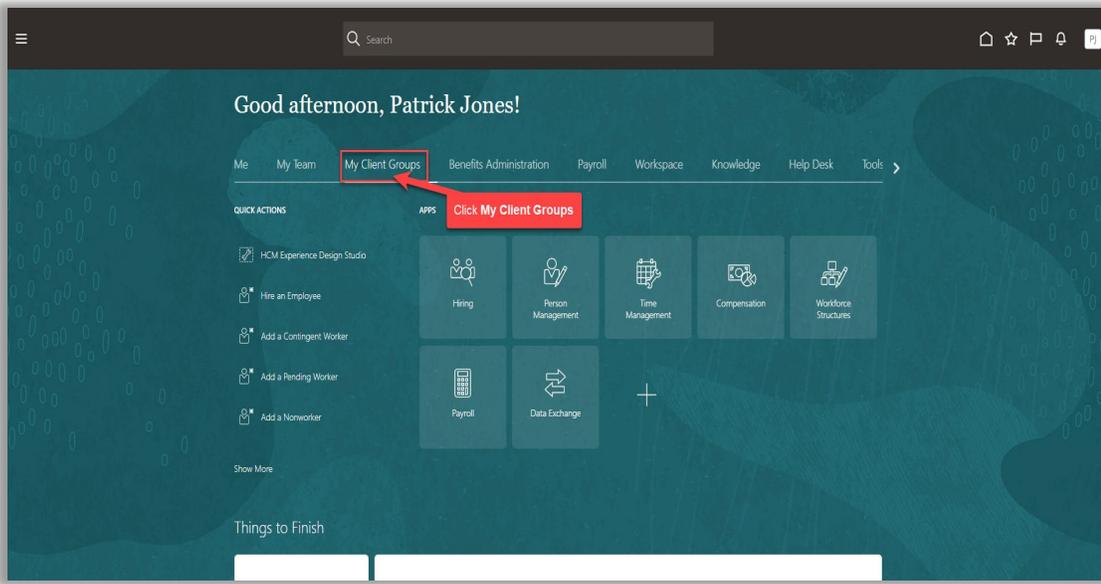


Workforce Additional Processes

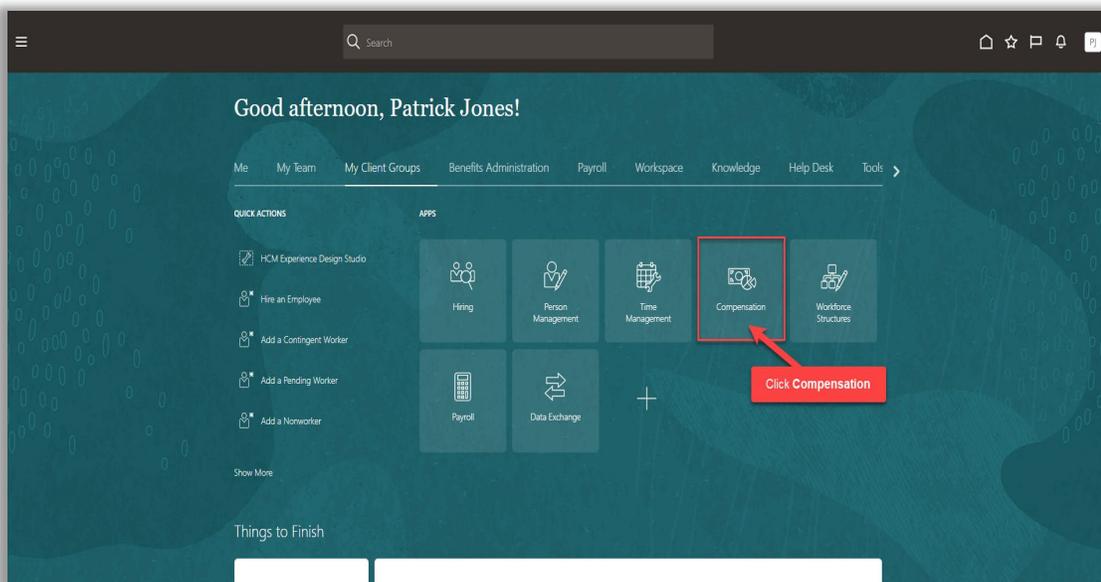
Process Workforce Compensation Change Statements

Navigation: Home>My Client Groups>Compensation>Run Batch Processes>Run Across From Process Workforce Compensation Change Statements>Enter Information>Submit

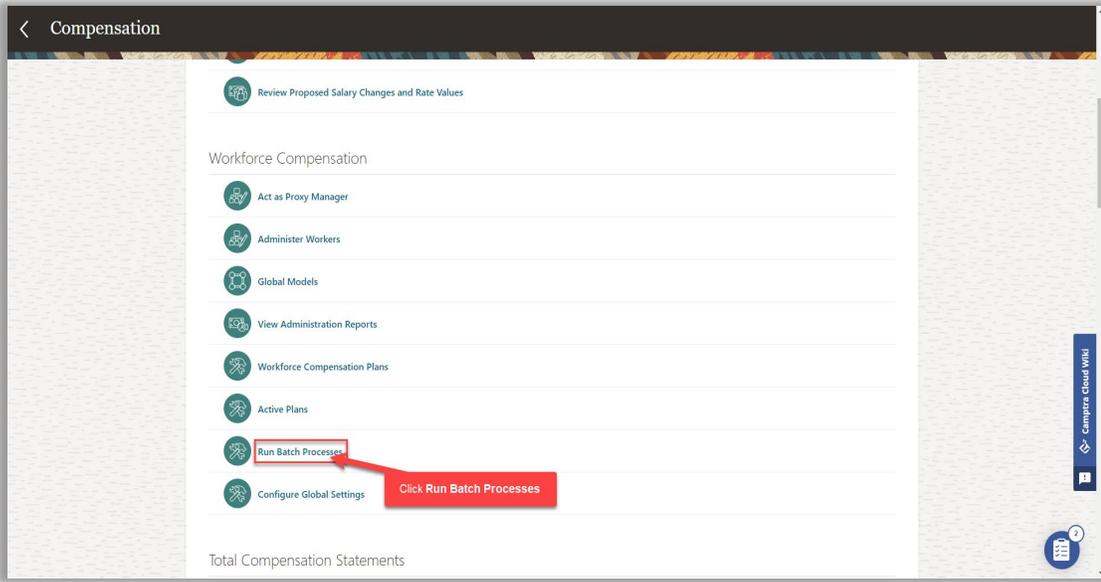
From the home screen, click **My Client Groups**



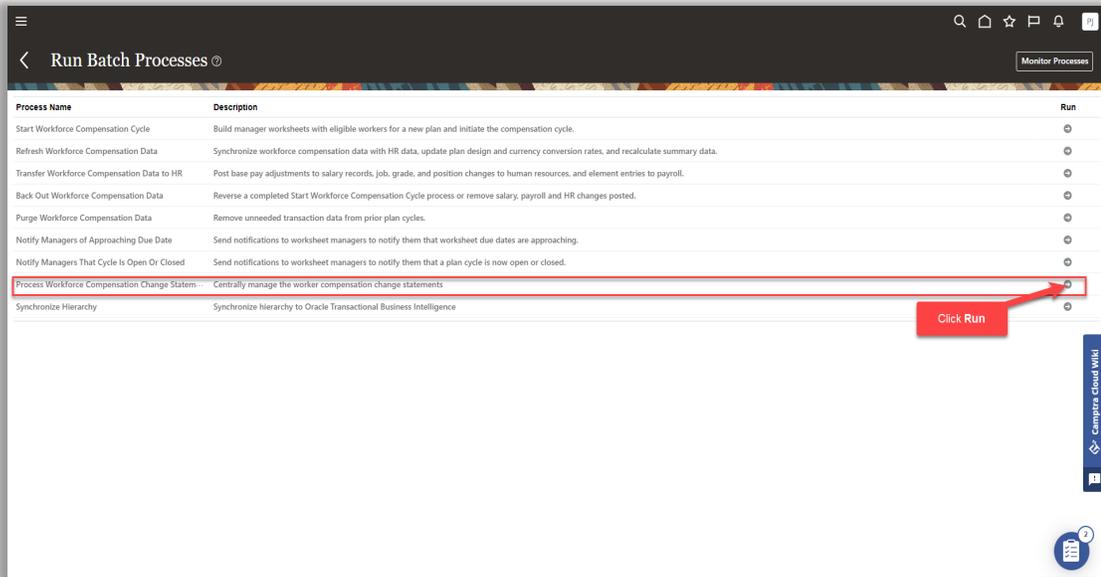
Next, click **Compensation**



Under **Workforce Compensation**, click **Run Batch Processes**. We can also search for **Run Batch Processes** using the search bar on the top left of the page



Across from **Process Workforce Compensation Change Statements**, click **Run**



Enter the **Basic Options** information and if needed, we can click **Advanced** to enter Advanced criteria

This process will be queued up for submission at position 1

Name Process Workforce Compensation Change Statements
Description Centrally manage workforce compensation change ...
Schedule As soon as possible

Notify me when this process ends

Submission Notes

Process Options: **Advanced** Submit Cancel

Enter the below information

Basic Options
Parameters

*Plan Notify Workers
*Cycle Trial run
*Mode Include trace statements in log file

Statement Group
Template
Expiration
*Visibility

Allow staggered release of statements
Statement Generation Timing
Output Format

Population Filters
Enterprise ERPWebTutor Enterprise
Country
Legal Employer
Business Unit

Once the information is entered, click **Submit**

This process will be queued up for submission at position 1

Name Process Workforce Compensation Change Statements
Description Centrally manage workforce compensation change ...
Schedule As soon as possible

Notify me when this process ends

Submission Notes

Process Options: Advanced **Submit** Cancel

Basic Options
Parameters

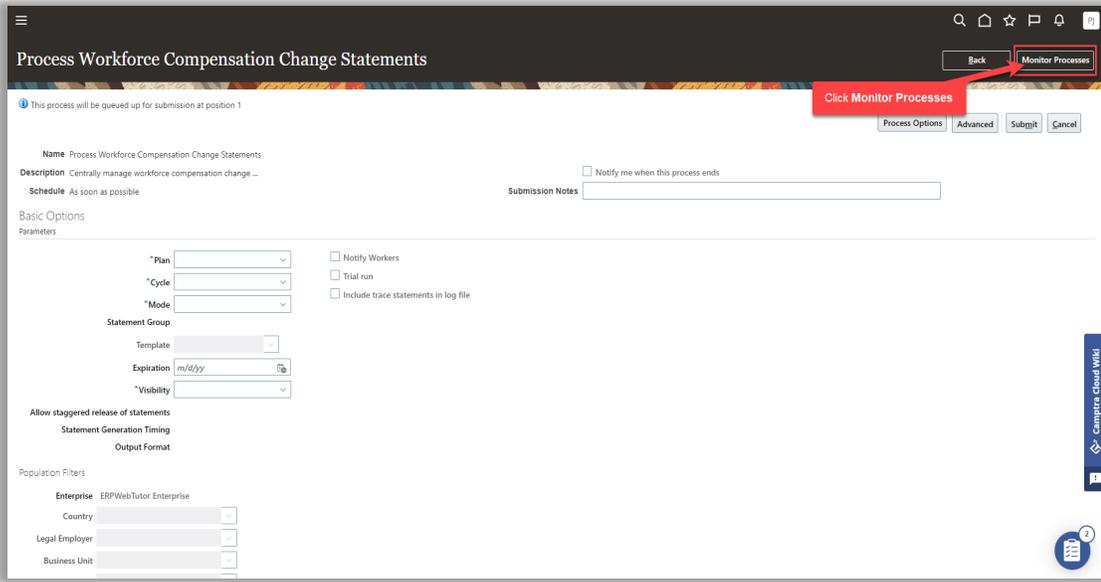
*Plan Notify Workers
*Cycle Trial run
*Mode Include trace statements in log file

Statement Group
Template
Expiration
*Visibility

Allow staggered release of statements
Statement Generation Timing
Output Format

Population Filters
Enterprise ERPWebTutor Enterprise
Country
Legal Employer
Business Unit

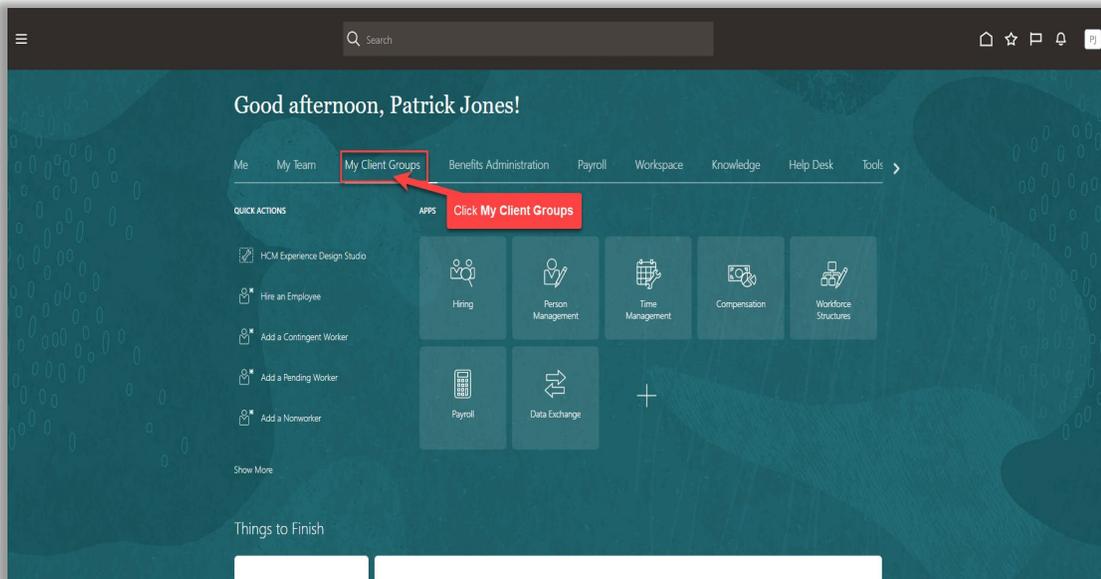
Click **Monitor Processes** to check the status of the process



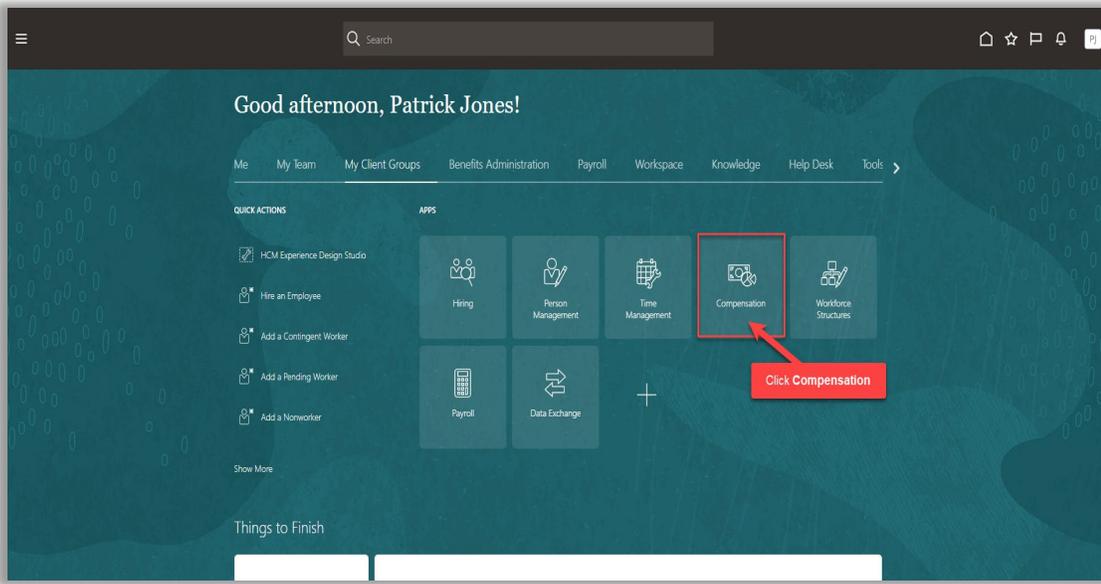
Purge Workforce Compensation Plan Data

Navigation: Home>My Client Groups>Compensation>Run Batch Processes>Run Across From Purge Workforce Compensation Data >Enter Information>Submit

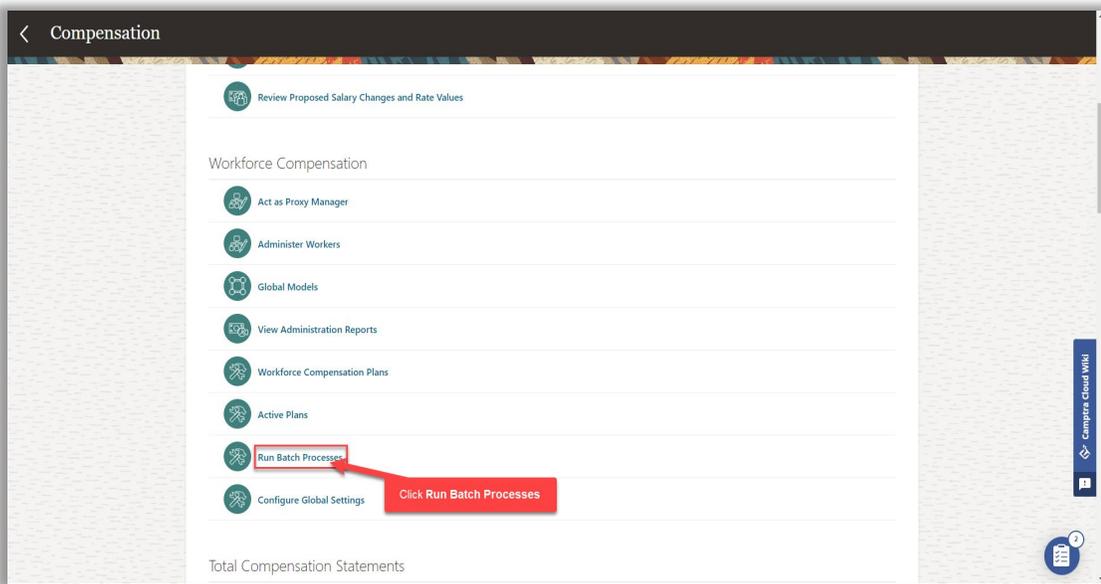
From the home screen, click **My Client Groups**



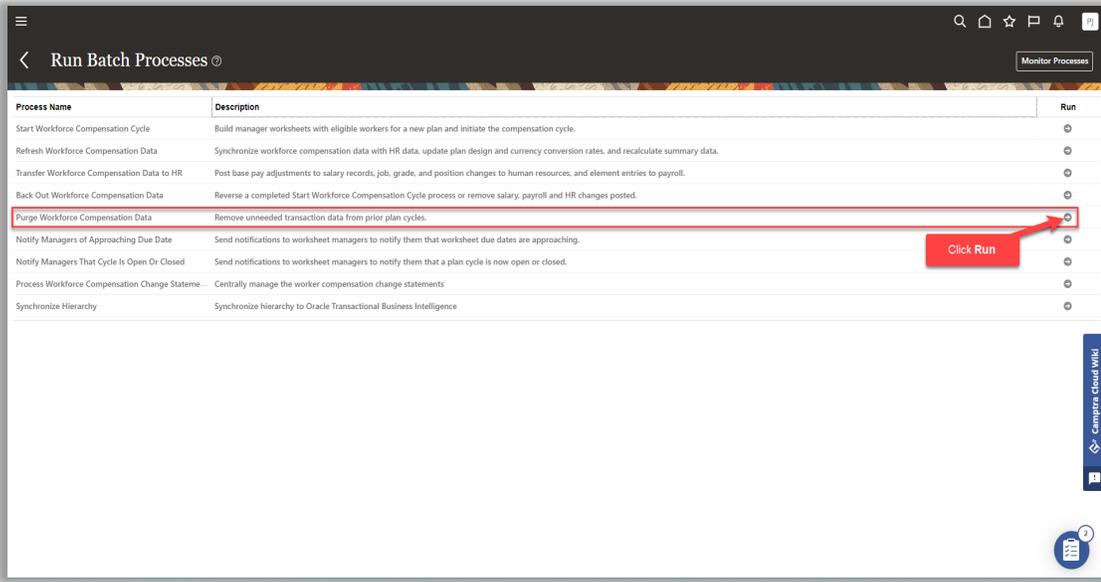
Next, click **Compensation**



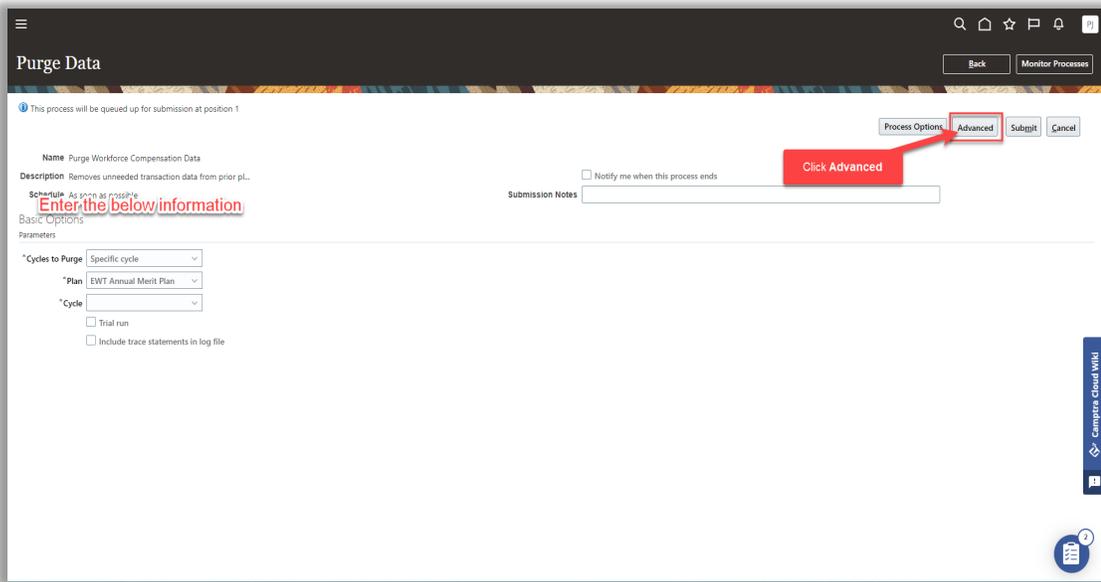
Under **Workforce Compensation**, click **Run Batch Processes**. We can also search for **Run Batch Processes** using the search bar on the top left of the page



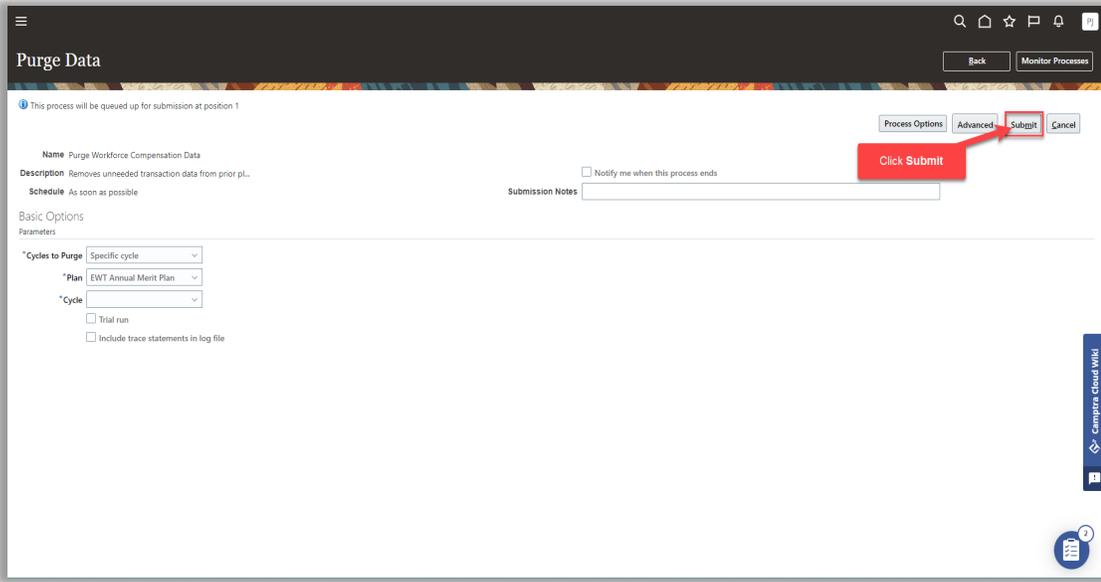
Across from **Purge Workforce Compensation Data**, click **Run**



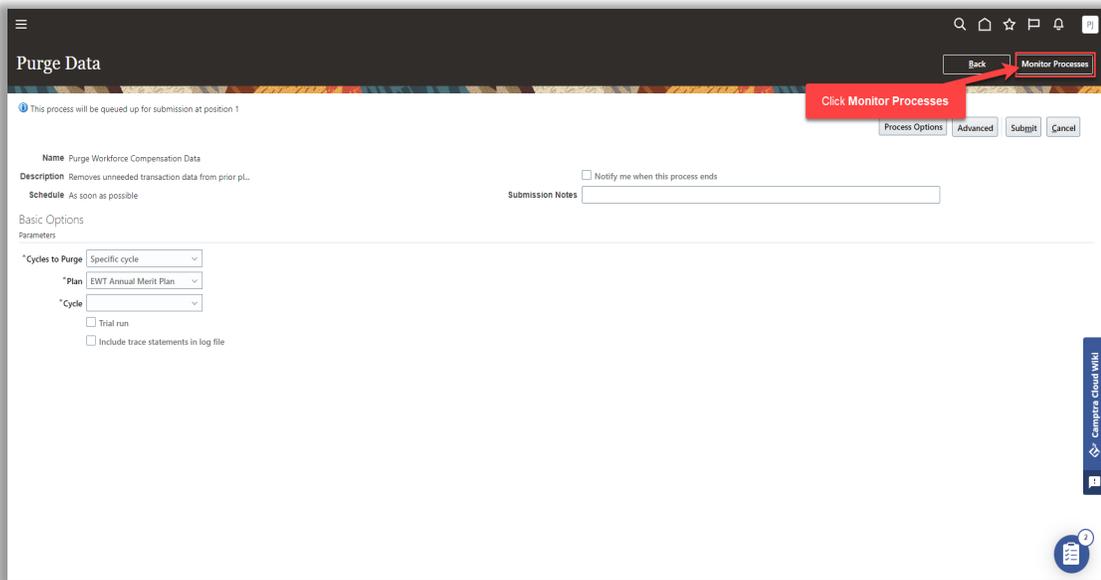
Enter the **Cycles to Purge**, **Plan**, and **Cycle** and if needed, we can click **Advanced** to enter Advanced criteria



Once the information is entered, click **Submit**



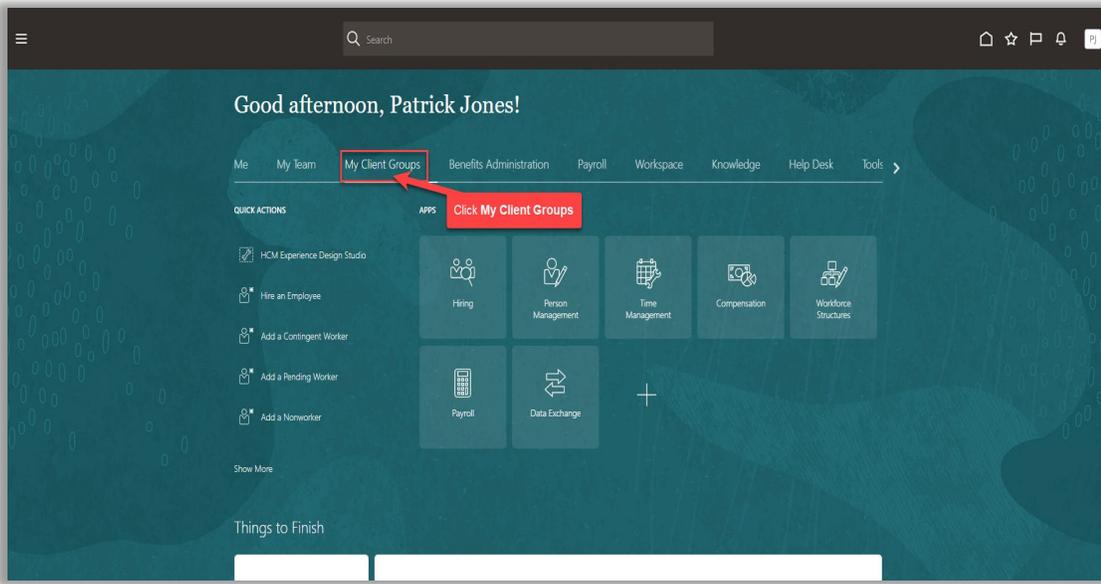
Click **Monitor Processes** to check the status of the process



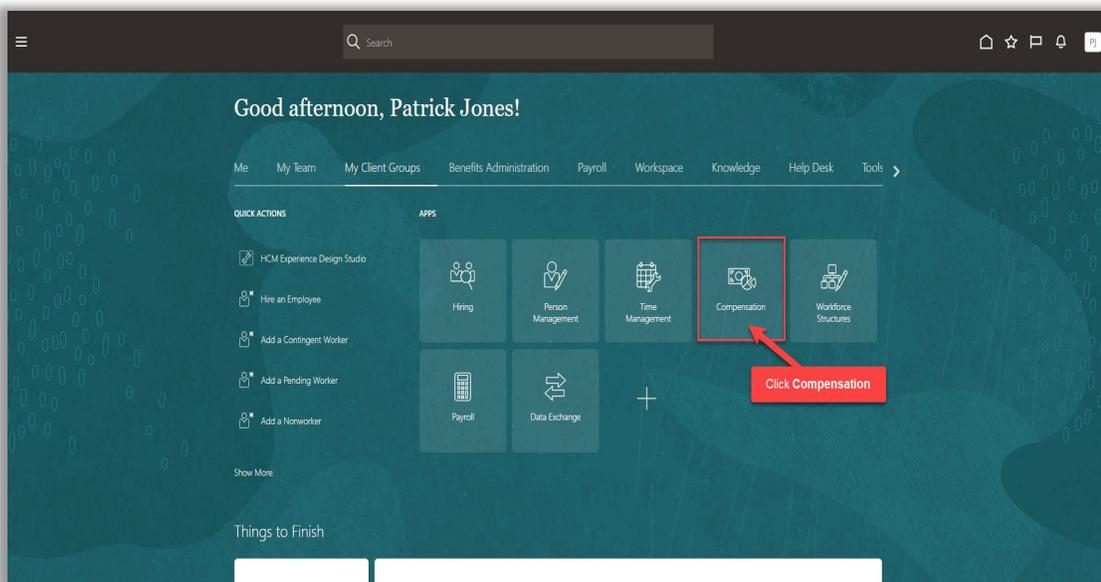
Refresh Workforce Compensation Plan Data

Navigation: Home>My Client Groups>Compensation>Run Batch Processes>Run Across From Refresh Workforce Compensation Plan Data>Enter Information>Submit

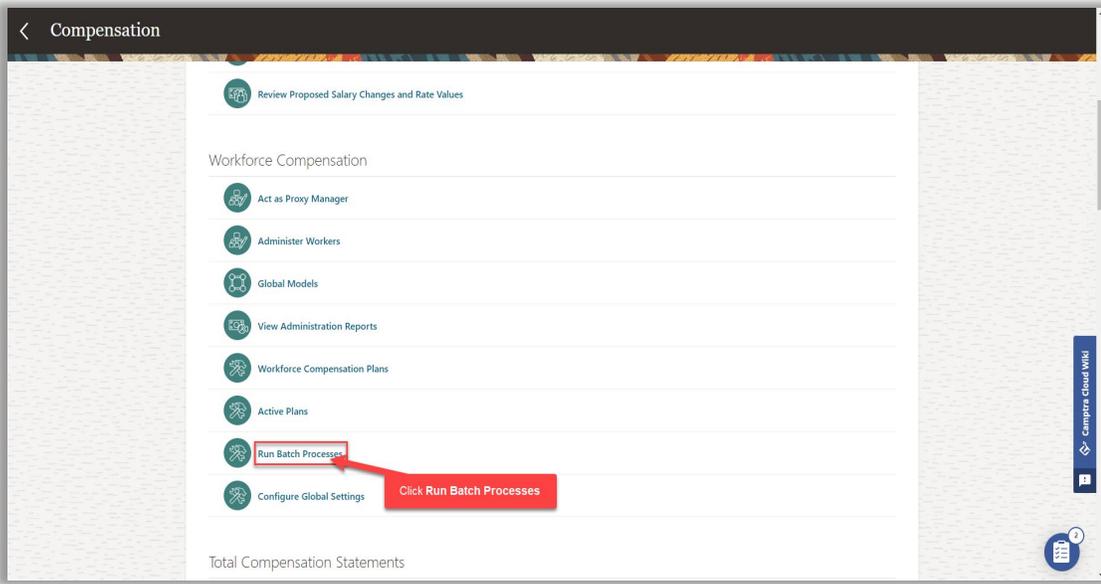
From the home screen, click **My Client Groups**



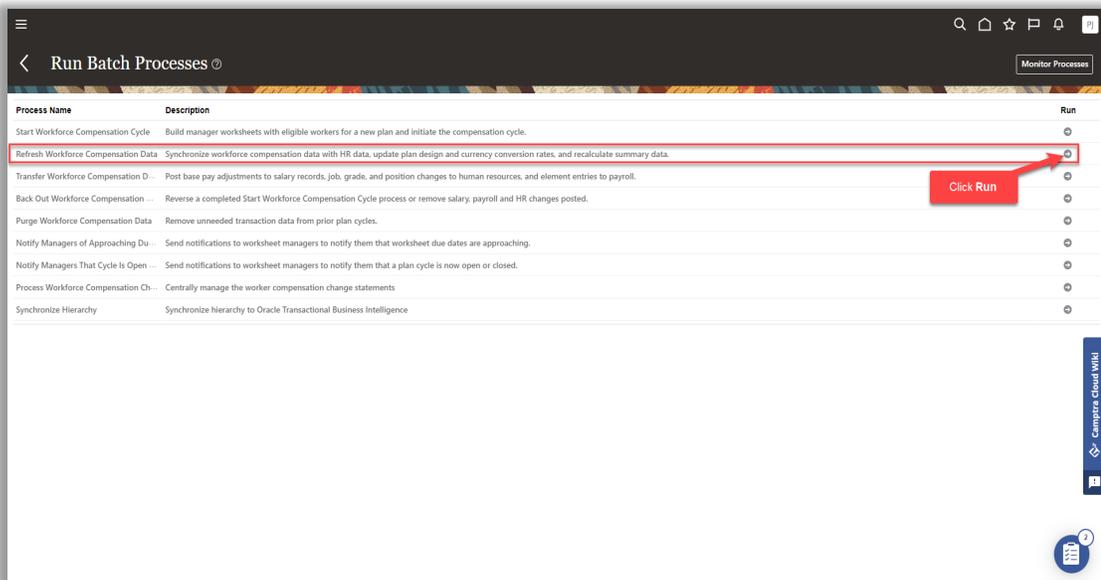
Next, click **Compensation**



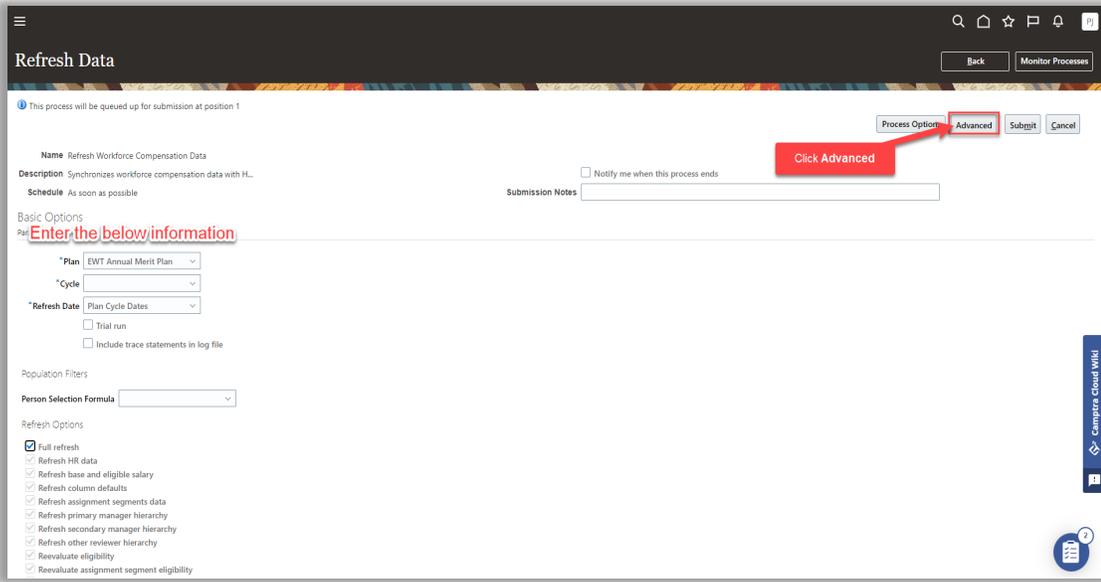
Under **Workforce Compensation**, click **Run Batch Processes**. We can also search for **Run Batch Processes** using the search bar on the top left of the page



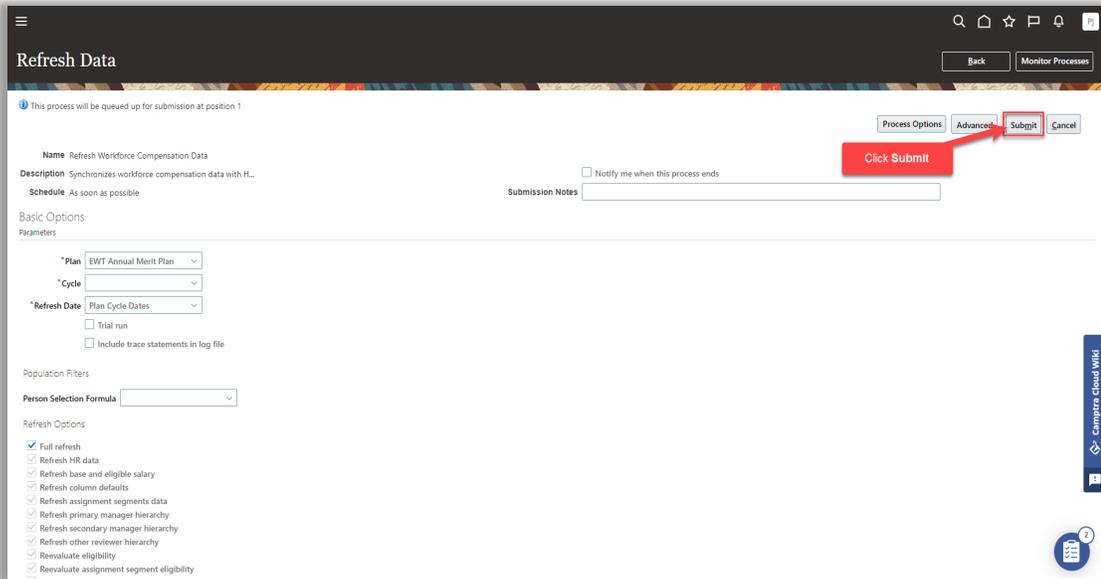
Across from Refresh Workforce Compensation Data, click Run



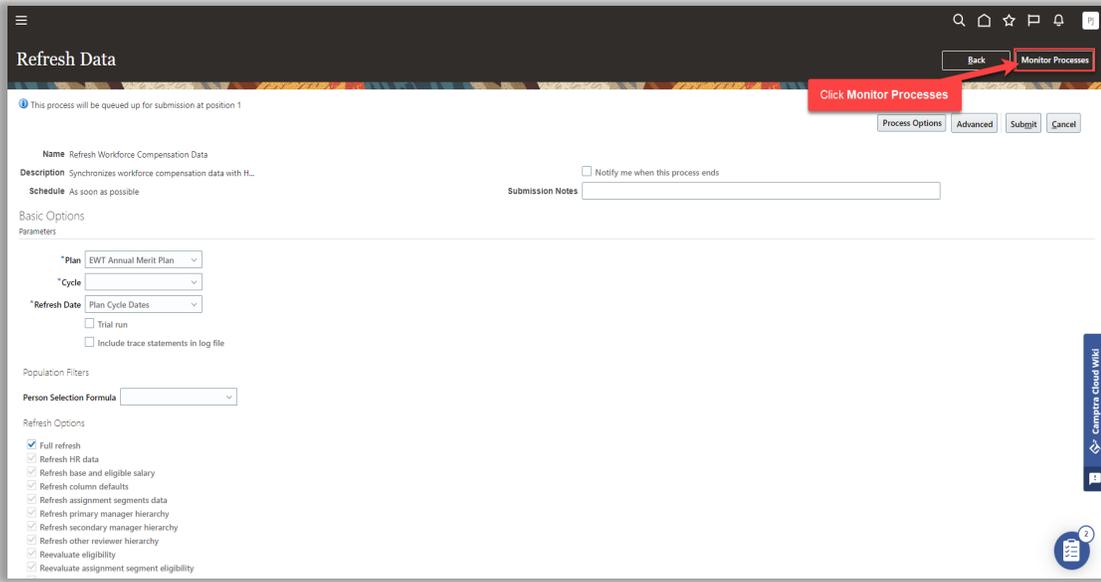
Enter the **Plan**, **Cycle**, and **Refresh Date**. Also, we can select the **Person Selection Formula**, if needed. Next, enter the **Refresh Options** and if needed, we can click **Advanced** to enter Advanced criteria



Once the information is entered, click **Submit**



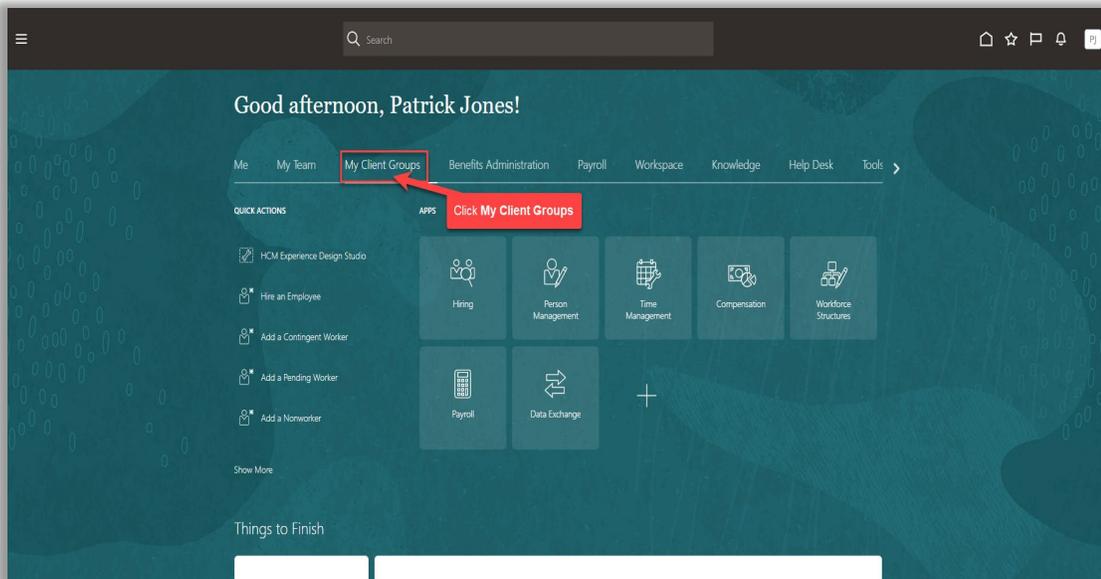
Click **Monitor Processes** to check the status of the process



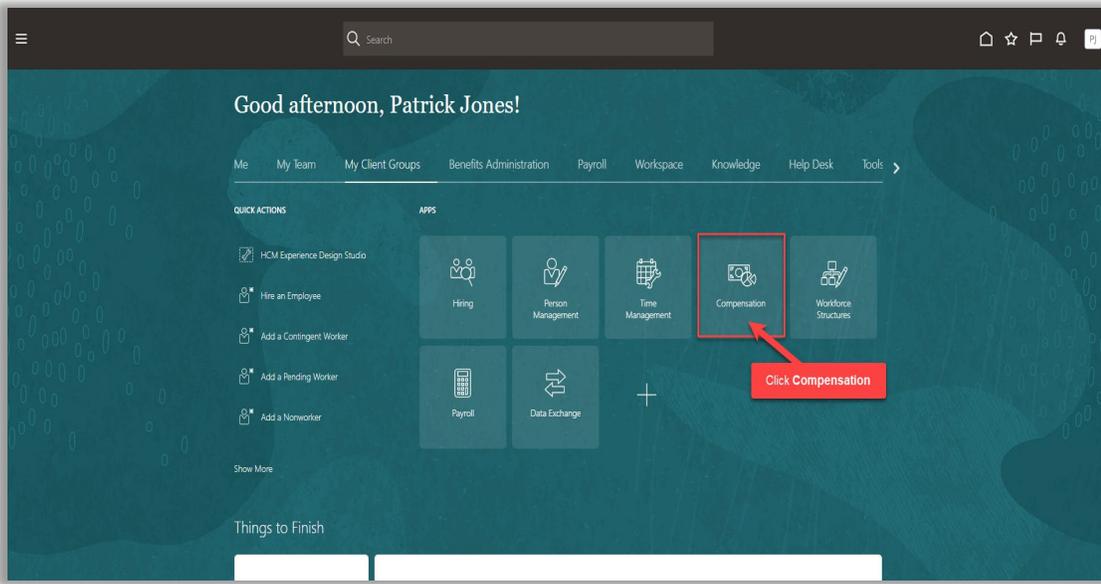
Transfer Compensation Data To HR

Navigation: Home>My Client Groups>Compensation>Run Batch Processes>Run Across From Transfer Compensation Data To HR>Enter Information>Submit

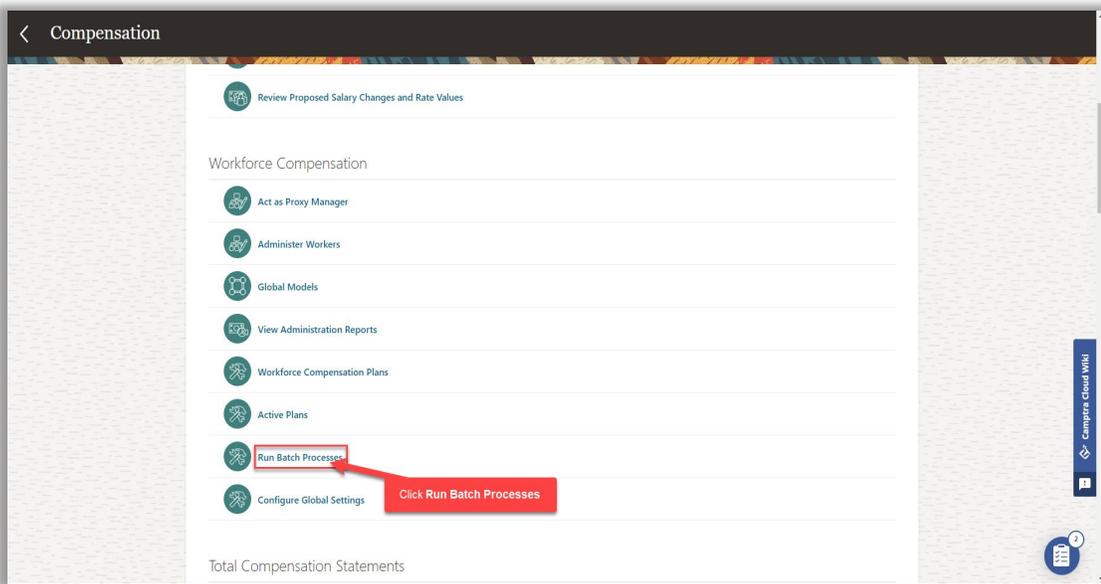
From the home screen, click **My Client Groups**



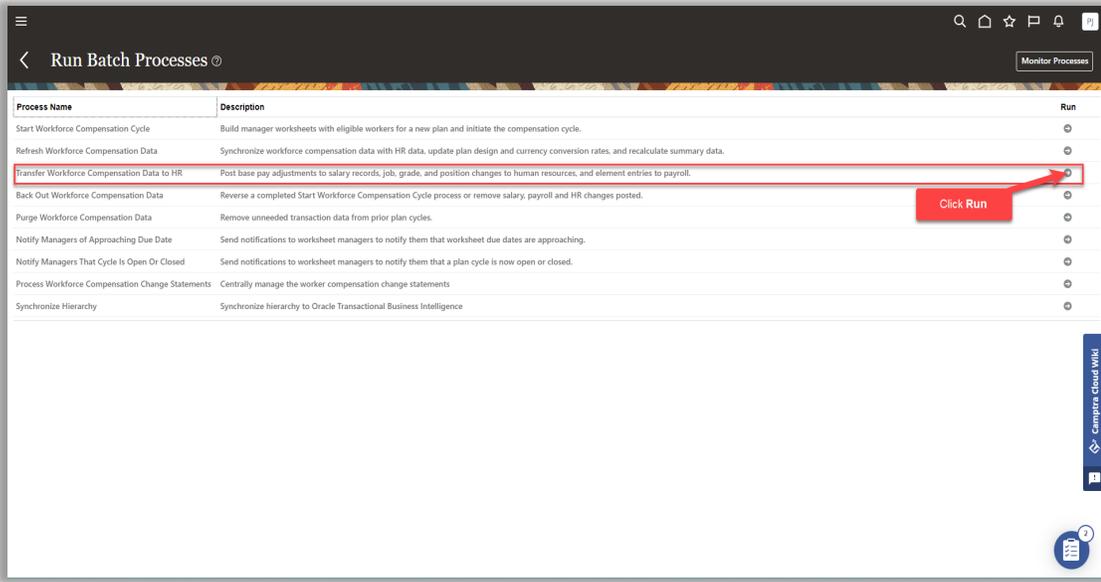
Next, click **Compensation**



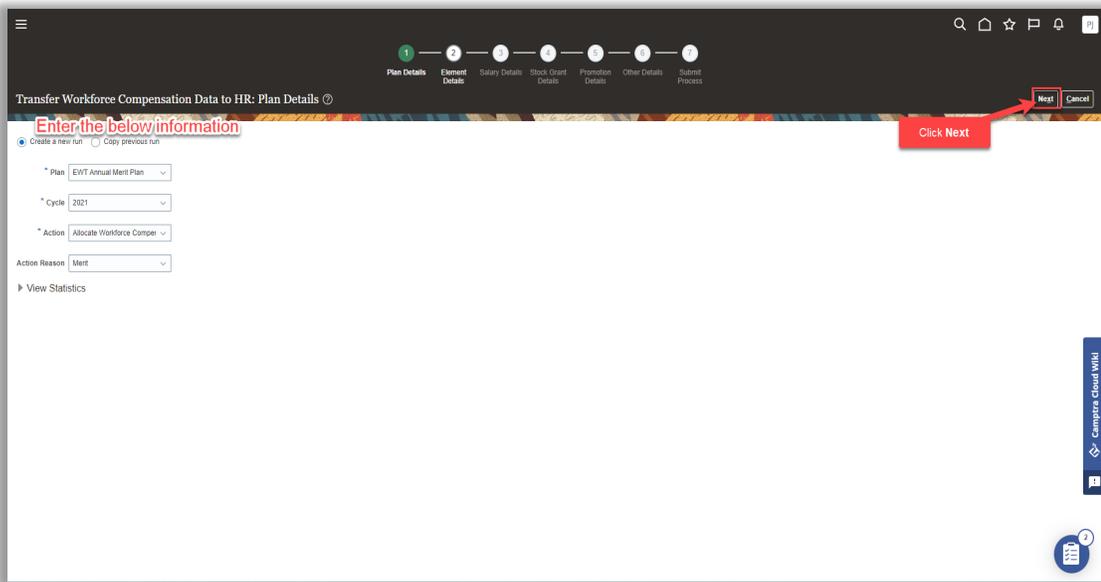
Under **Workforce Compensation**, click **Run Batch Processes**. We can also search for **Run Batch Processes** using the search bar on the top left of the page



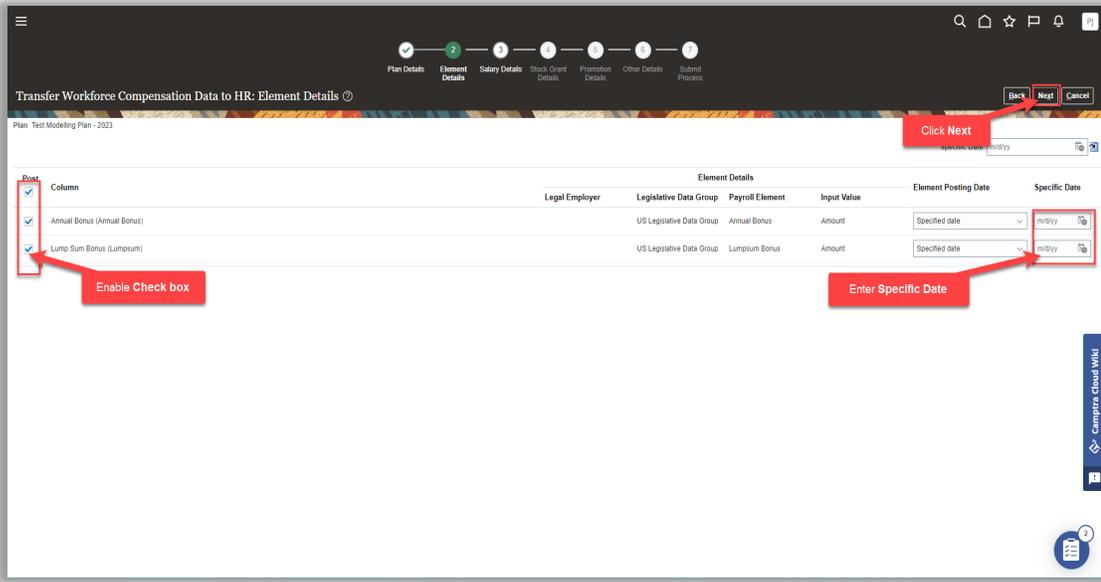
Across from **Transfer Compensation Data To HR**, click **Run**



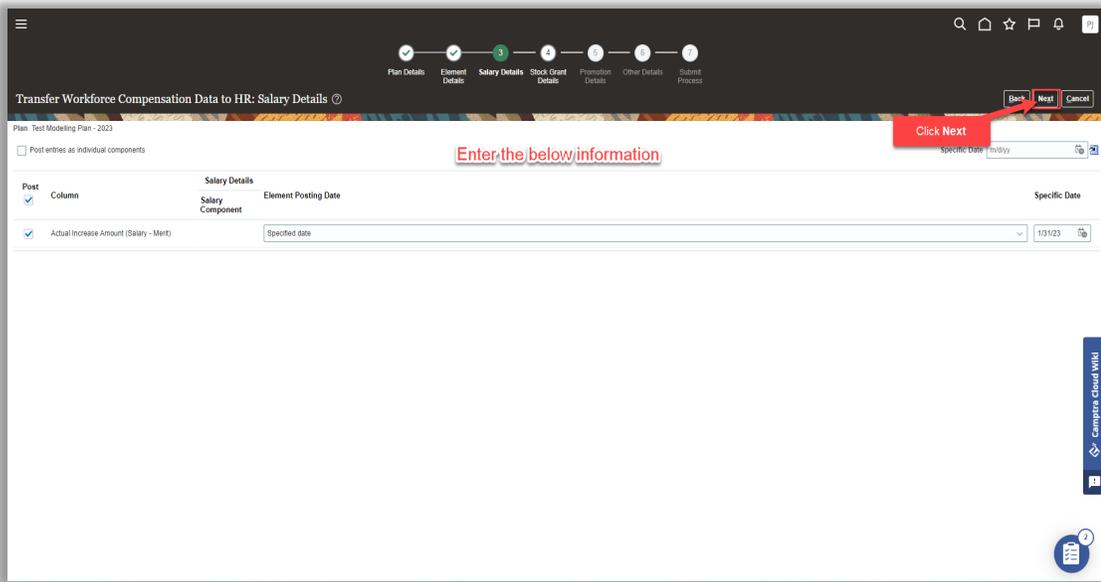
Enter the **Plan Details** and click **Next**



Enable the **Element Details**. Enable the **Elements** by enabling the check boxes. Enter the **Specific Date** for each element and click **Next**



Enter Salary Details by enabling the Element. Enter the Specific Date and click Next



Next, enter the Stock Grant Details, if applicable, and click Next

Transfer Workforce Compensation Data to HR: Stock Details

Plan: Test Modeling Plan - 2023

Record grant in the stock detail

Enter the below information

* Worksheet Columns Containing Shares Granted: Annual Bonus

* Grant Date: 1/3/23

Grant Price: _____

Grant ID: _____

* Grant Type: Incentive stock option

Grant Name: _____

Grant Number: _____

Trading Symbol: _____

Grant Reason: _____

Class: _____

Expiration Date: m/d/yy

Other Worker Information: _____

Vest Date: m/d/yy

Shares That Immediately Vest: %

Vesting Calculation Rounding: _____

Buttons: Back, Next, Cancel

Callout: Click Next

Next, enter the **Promotion Details**, if applicable, and click **Next**

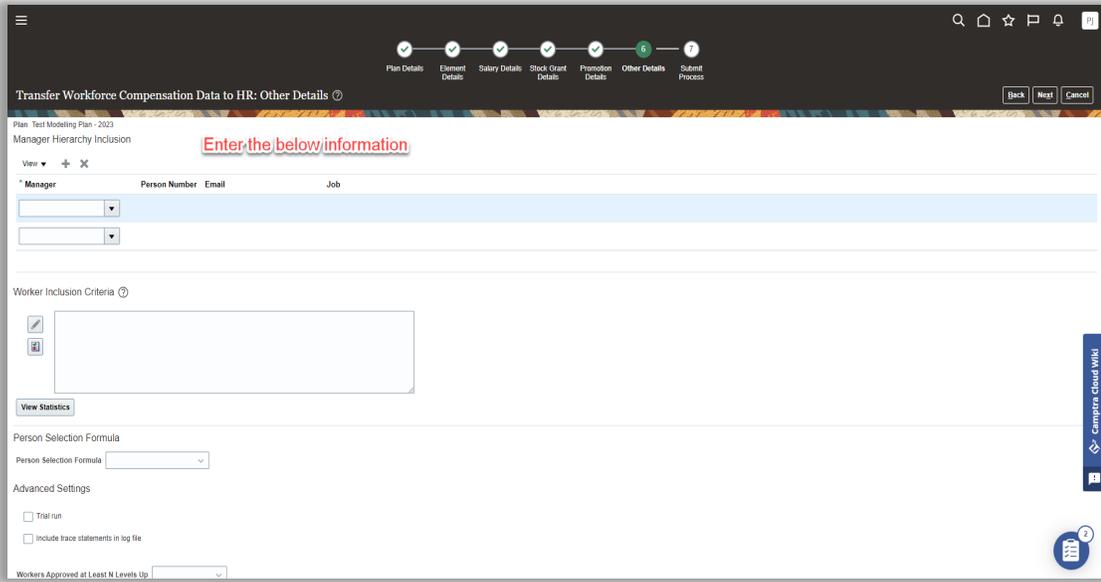
Transfer Workforce Compensation Data to HR: Promotion Details

Plan: Test Modeling Plan - 2023

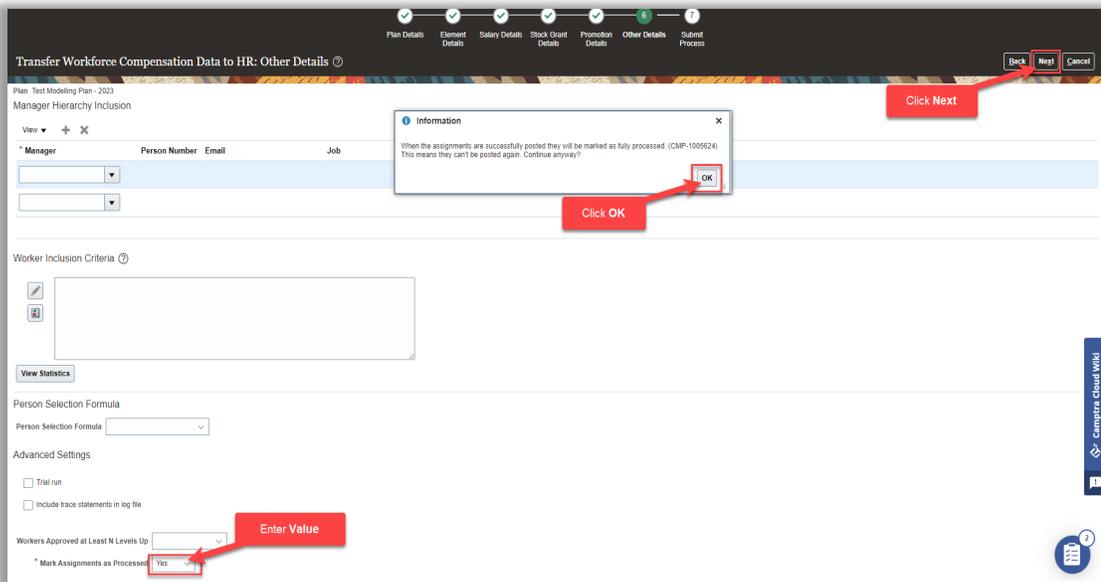
Buttons: Back, Next, Cancel

Callout: Click Next

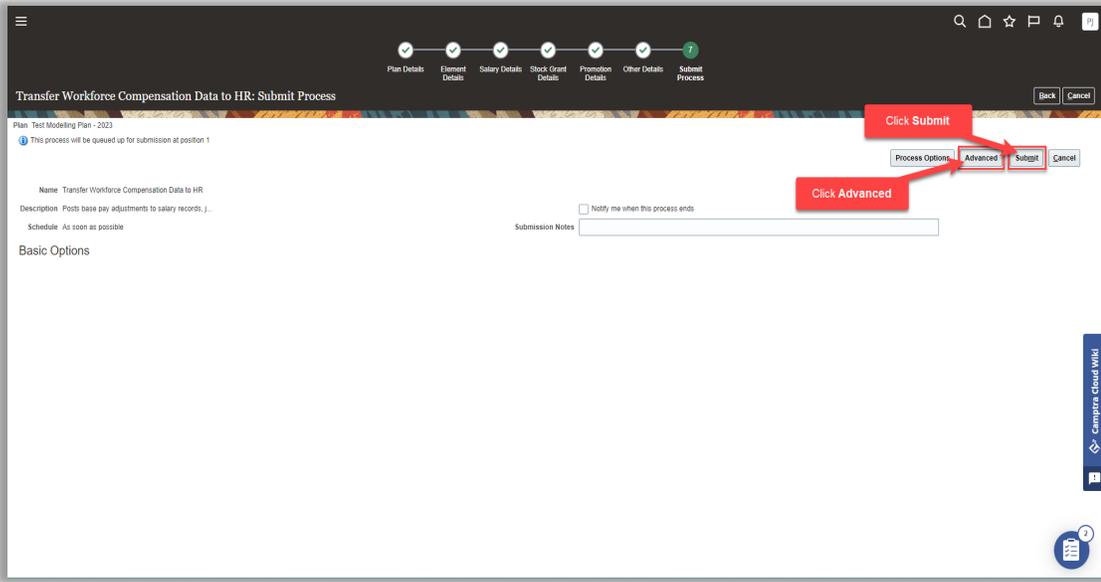
Lastly, we can enter the **Other Details**, if applicable.



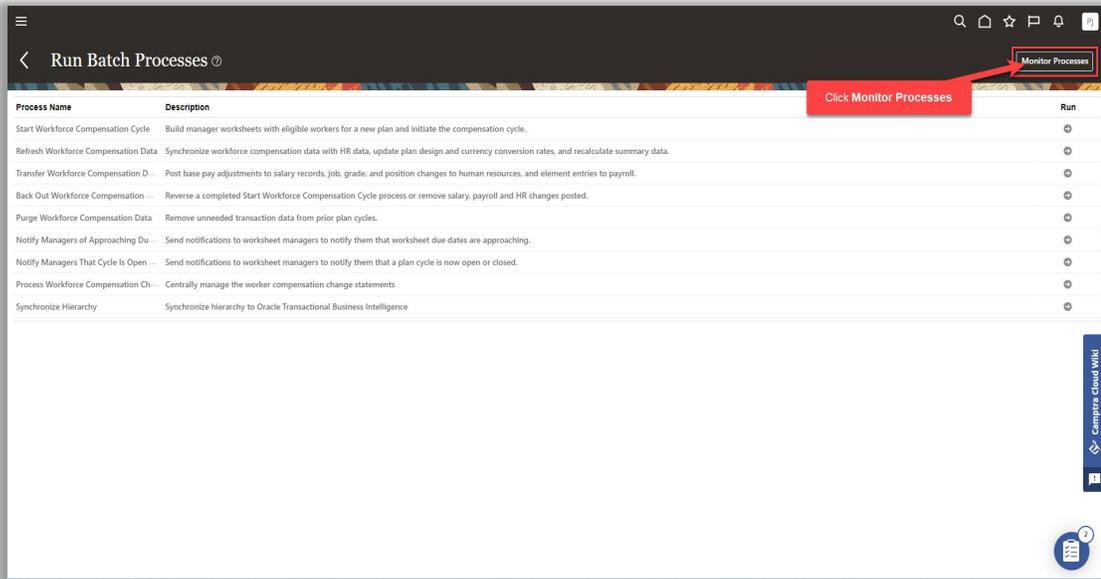
Enter the value for **Mark Assignments As Processed** and click **OK**. Then, click **Next**



Once the information is entered, we can enter **Advanced** options, if needed. Click **Submit**



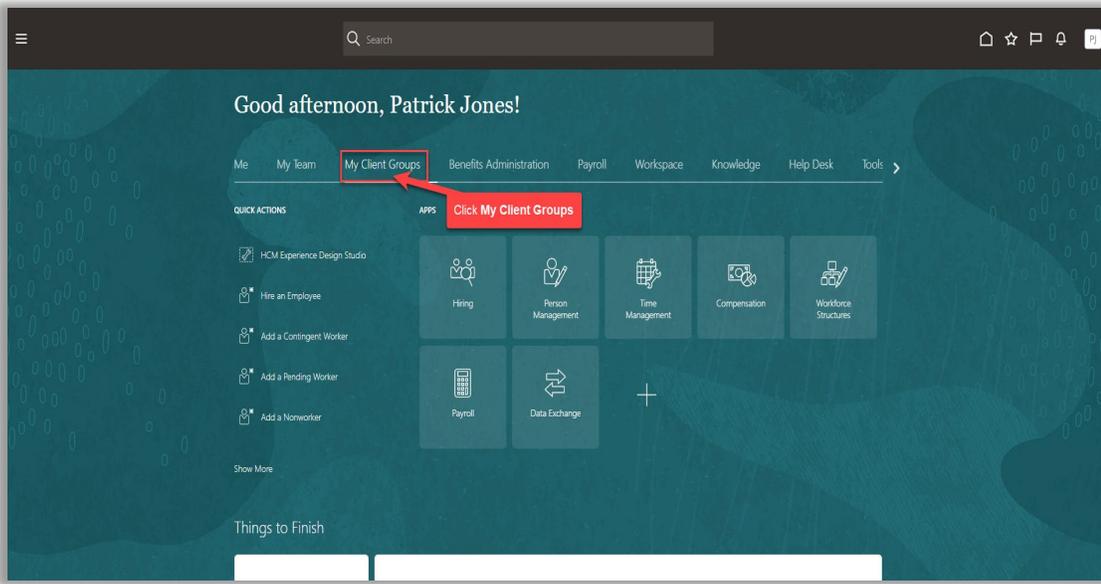
Click **Monitor Processes** to check the status of the process



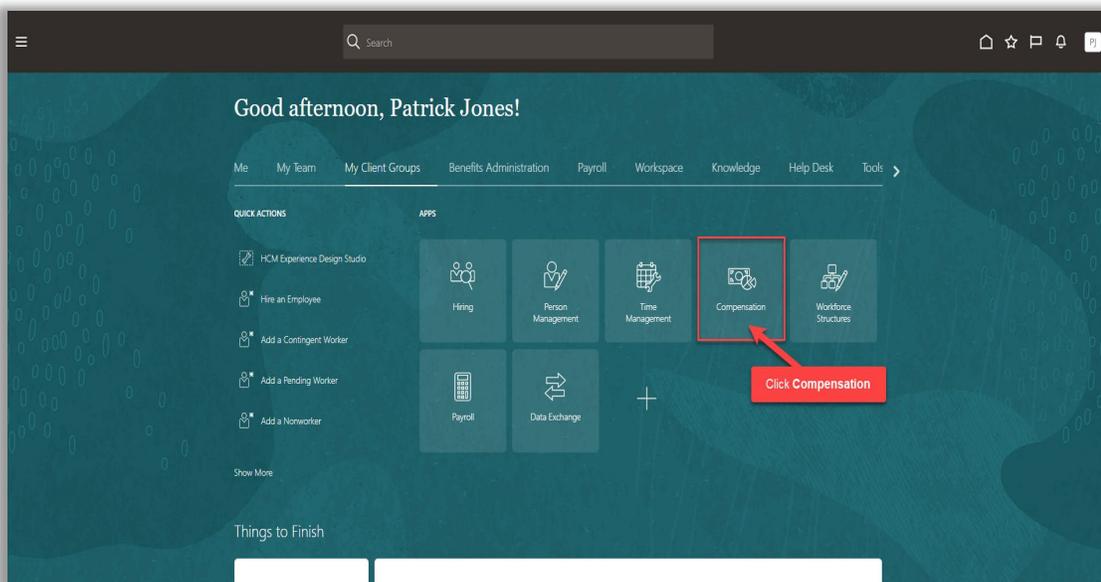
Backout Workforce Compensation Plan Data From HR

Navigation: Home>My Client Groups>Compensation>Run Batch Processes>Run Across From Back Out Workforce Compensation Plan Data>Enter Information>Submit

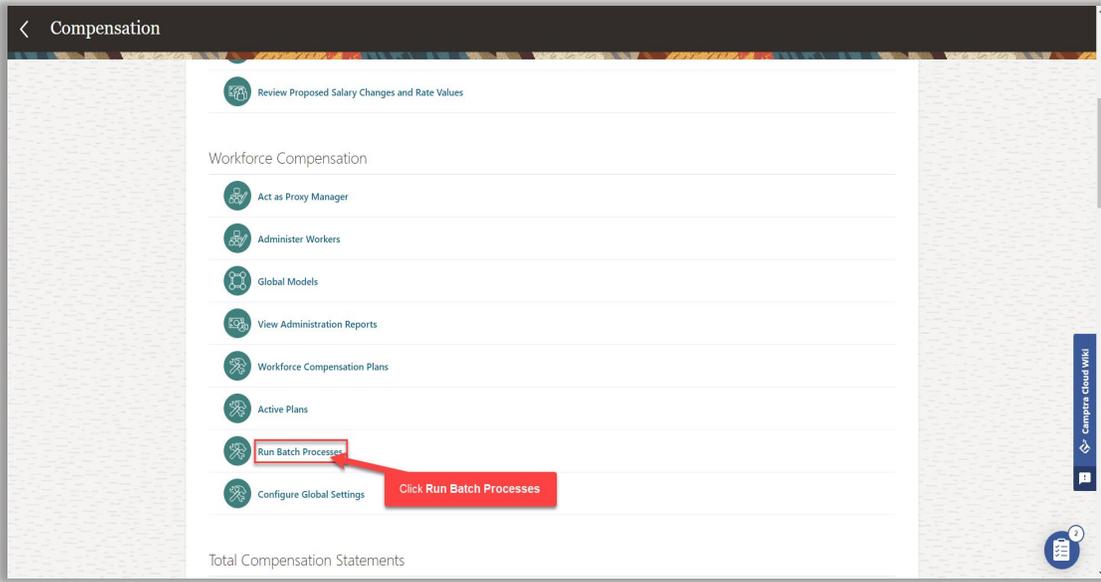
From the home screen, click **My Client Groups**



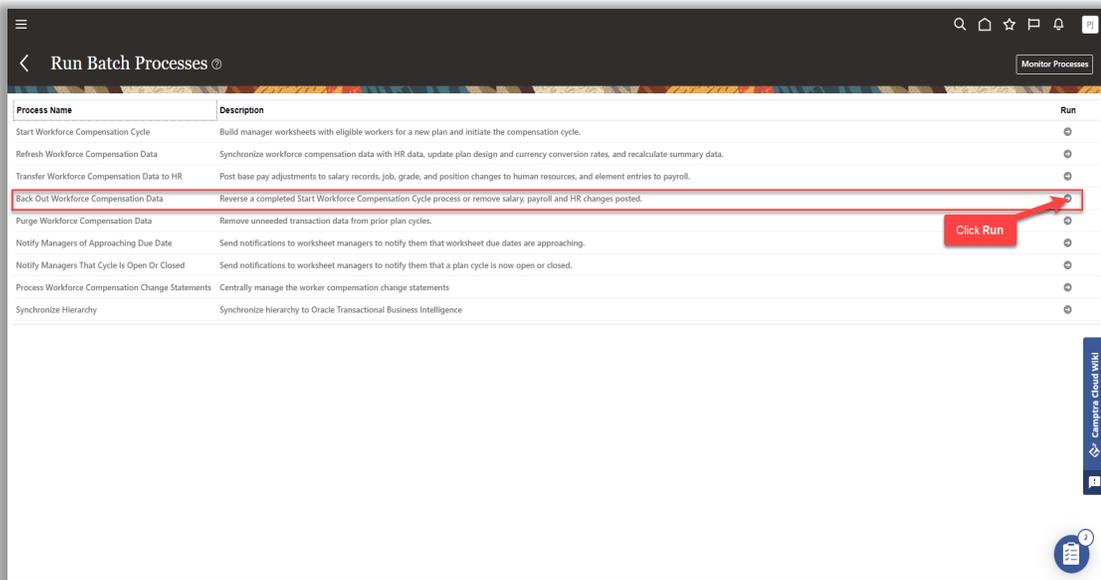
Next, click **Compensation**



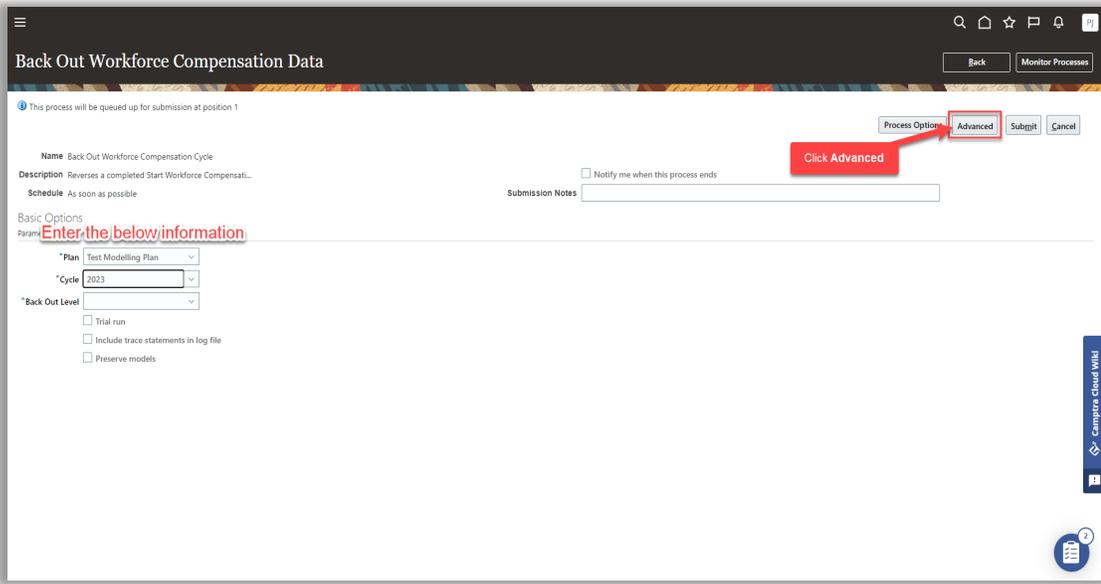
Under **Workforce Compensation**, click **Run Batch Processes**. We can also search for **Run Batch Processes** using the search bar on the top left of the page



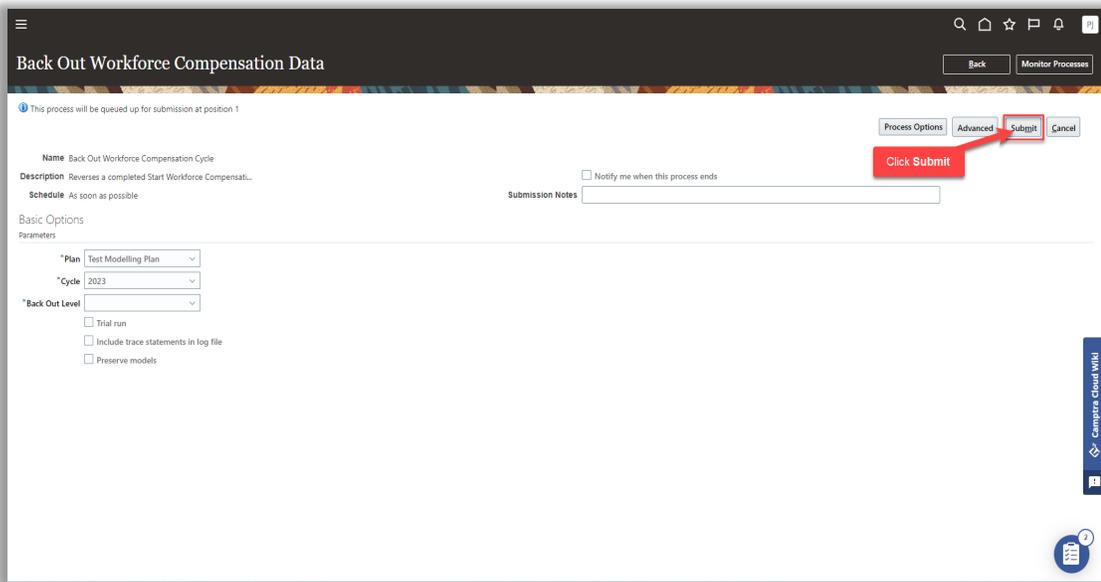
Across from **Back Out Workforce Compensation Data**, click **Run**



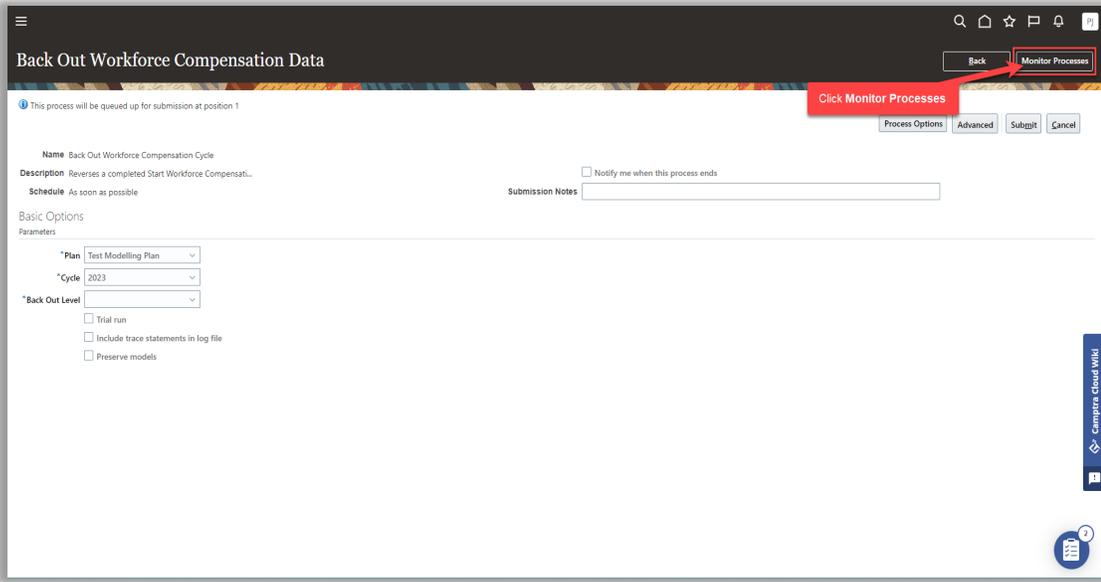
Enter the **Basic Options** and if needed, we can click **Advanced** to enter Advanced criteria



Once the information is entered, click **Submit**



Click **Monitor Processes** to check the status of the process

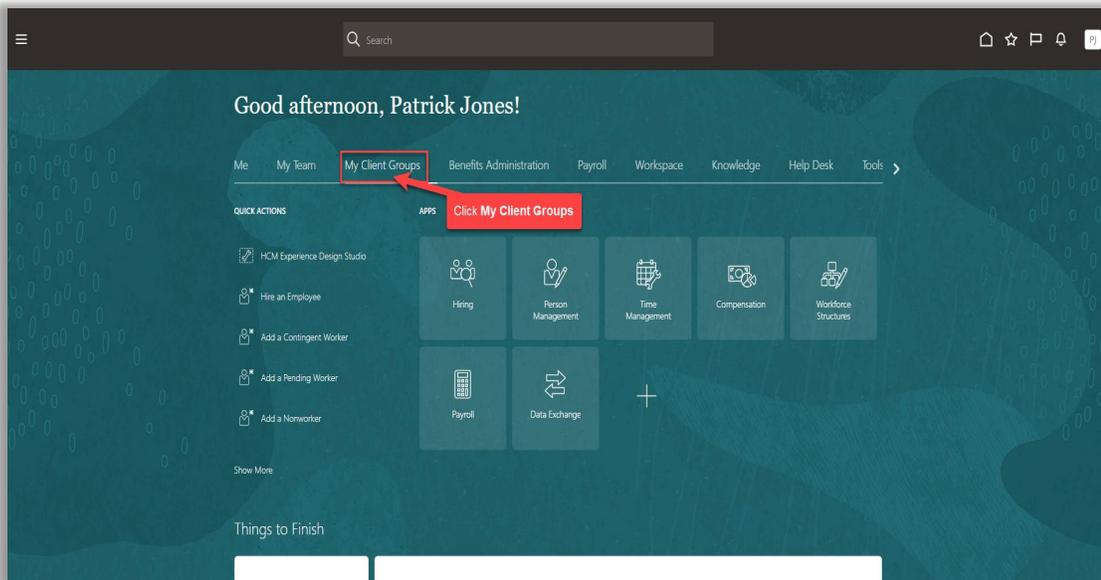


During Go Live: Update Worker Details

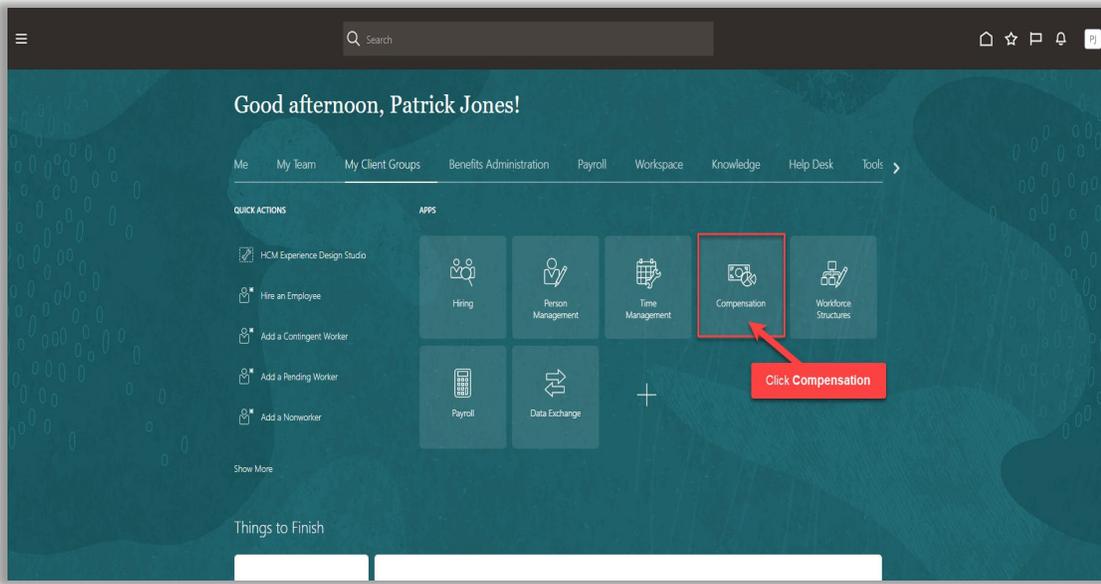
Administer Worker

Navigation: Home>My Client Groups>Compensation>Administer Workers>Search Worker>Select Worker>Select Plan>Manage Plan Information>Update>Save and Close

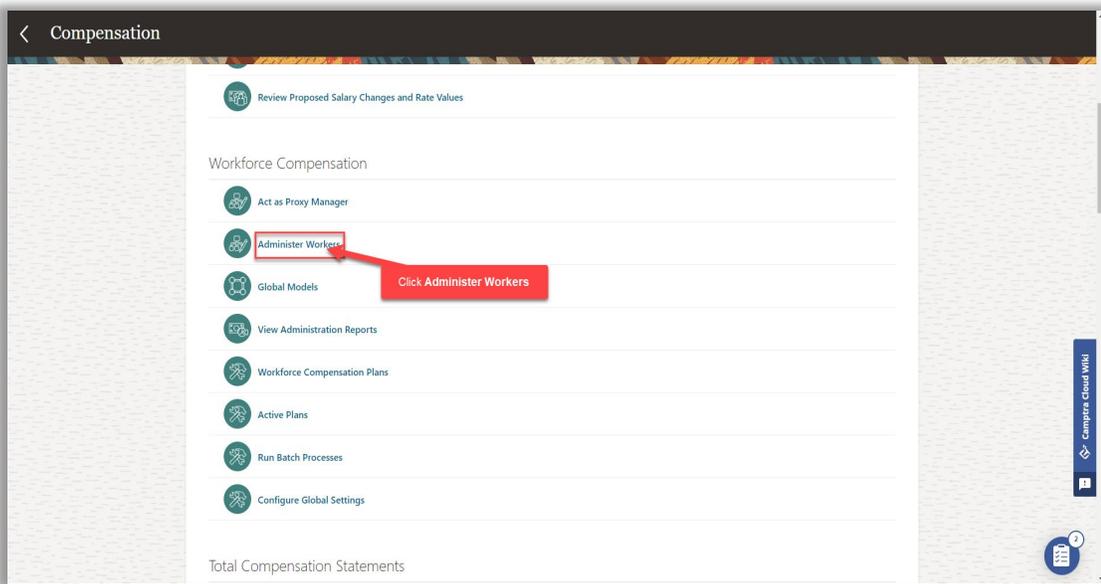
From the home screen, click **My Client Groups**



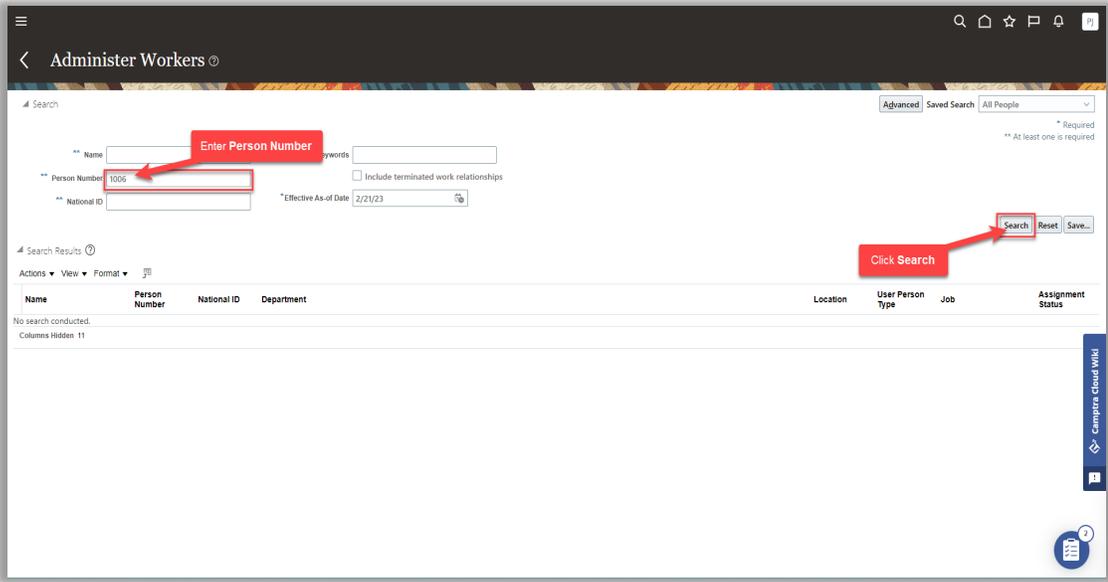
Next, click **Compensation**



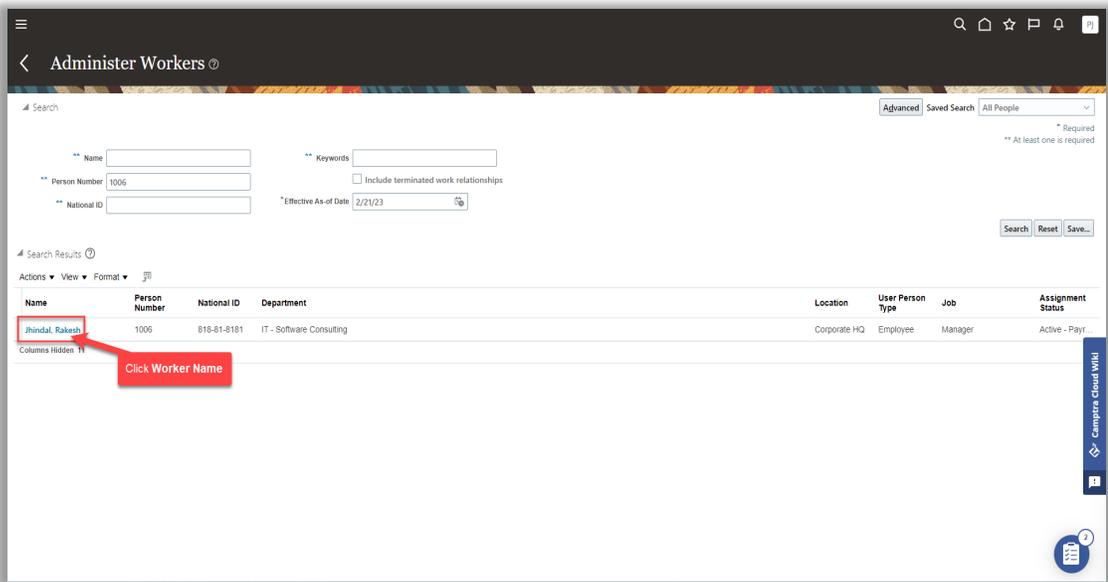
Under **Workforce Compensation**, click **Administer Workers**. We can also search for **Administer Workers** using the search bar on the top left of the page



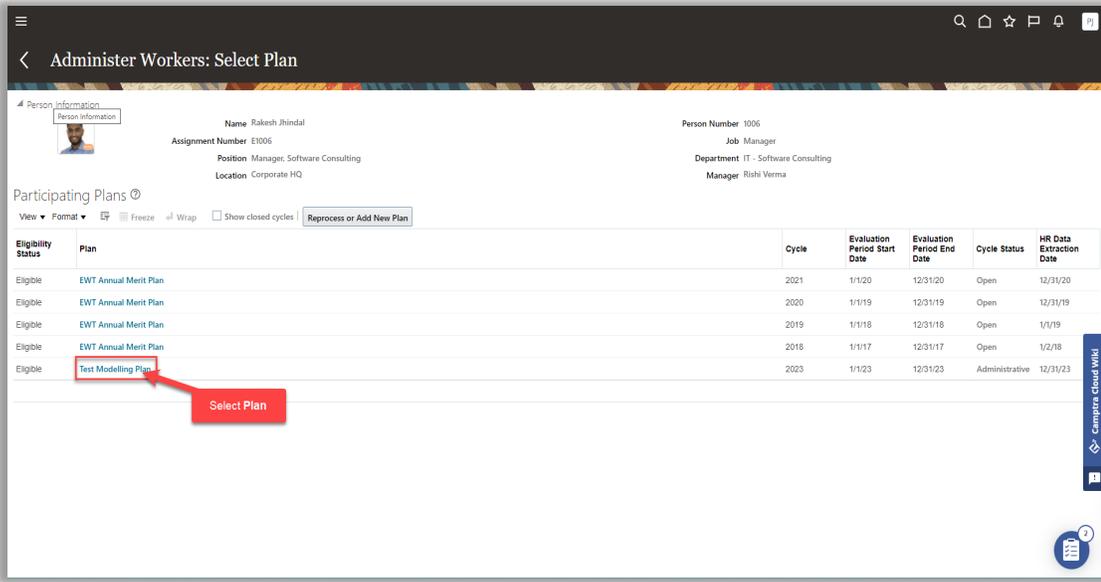
Enter the **Person Number** and click **Search**



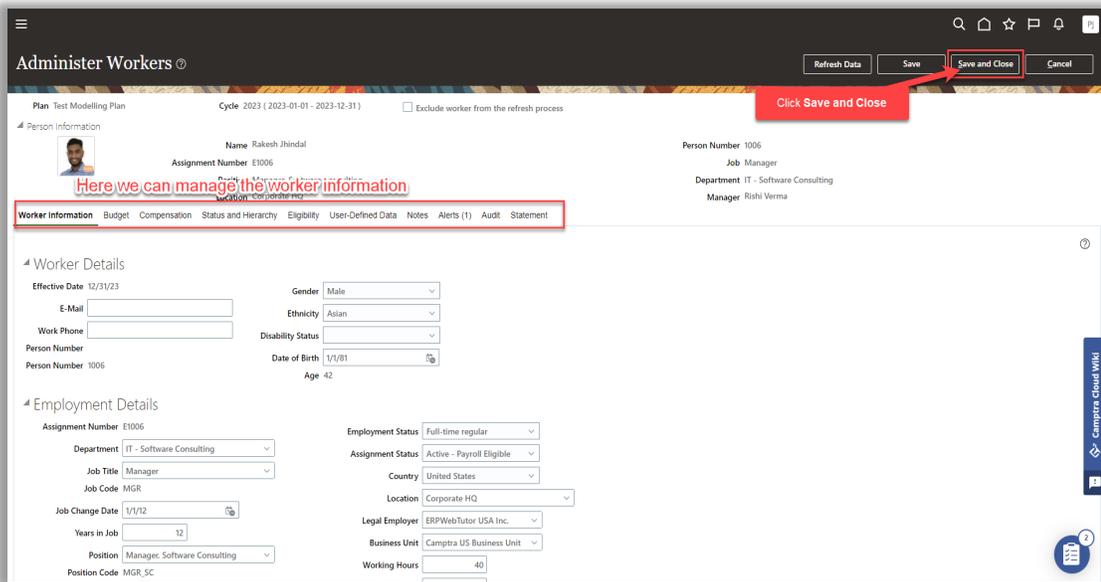
Click Worker Name



Select the Plan



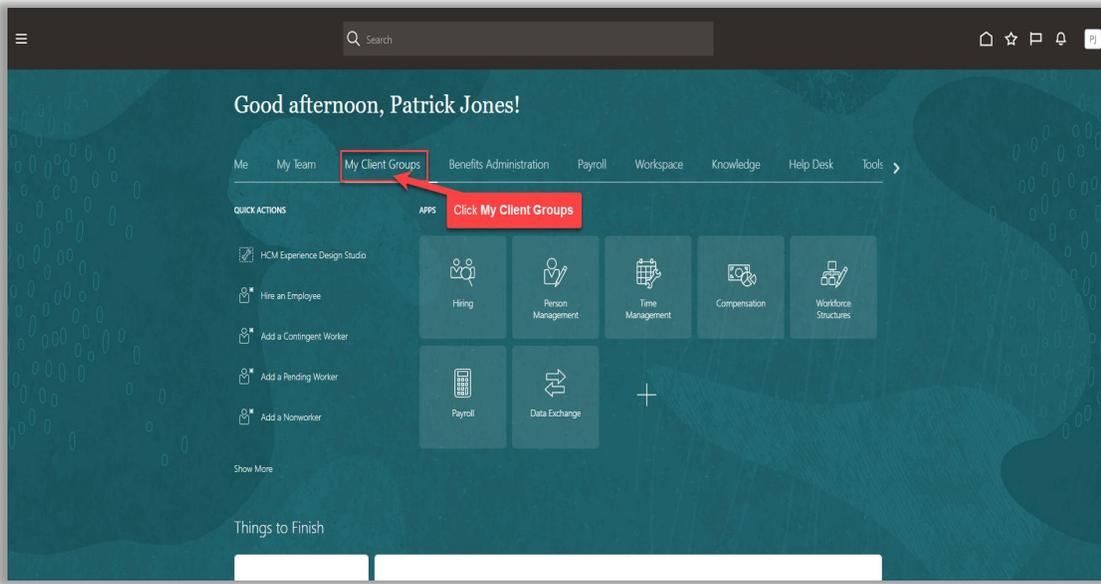
Here we can manage the worker information once the Plan is live and open for Compensation Planning. Once the updates have been made, click **Save and Close**



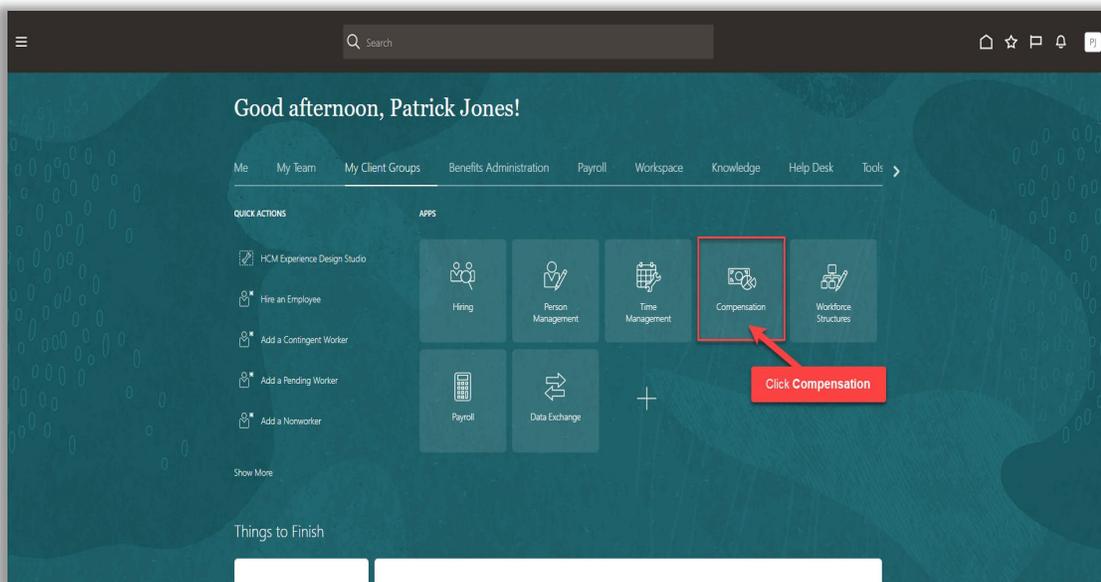
Update Worker Information

Navigation: Home>My Client Groups>Compensation>Administer Workers>Search Worker>Select Worker>Select Plan>Worker Information>Update>Save and Close

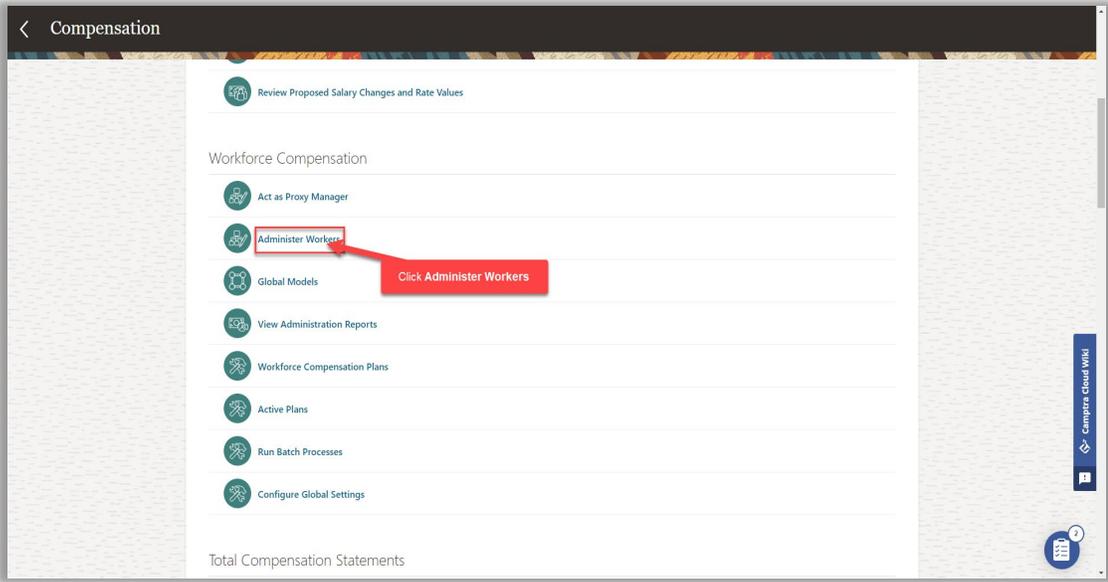
From the home screen, click **My Client Groups**



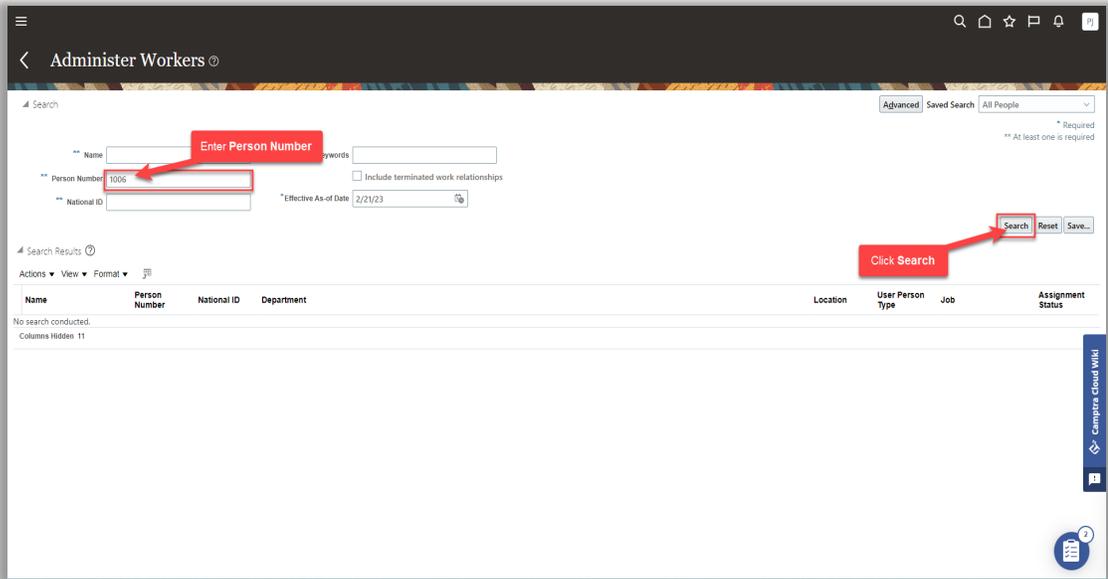
Next, click **Compensation**



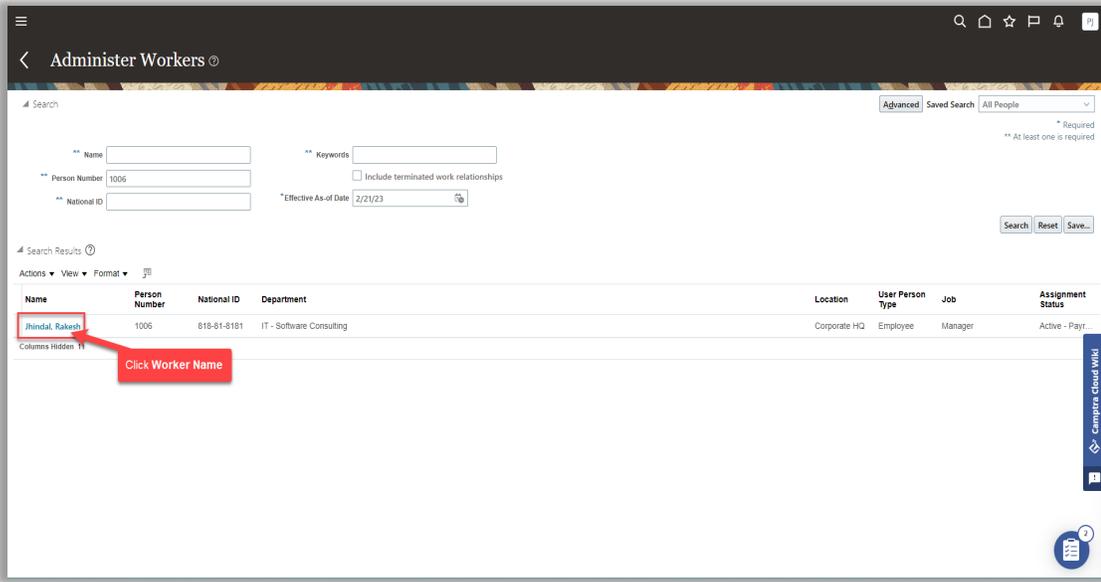
Under **Workforce Compensation**, click **Administer Workers**. We can also search for **Administer Workers** using the search bar on the top left of the page



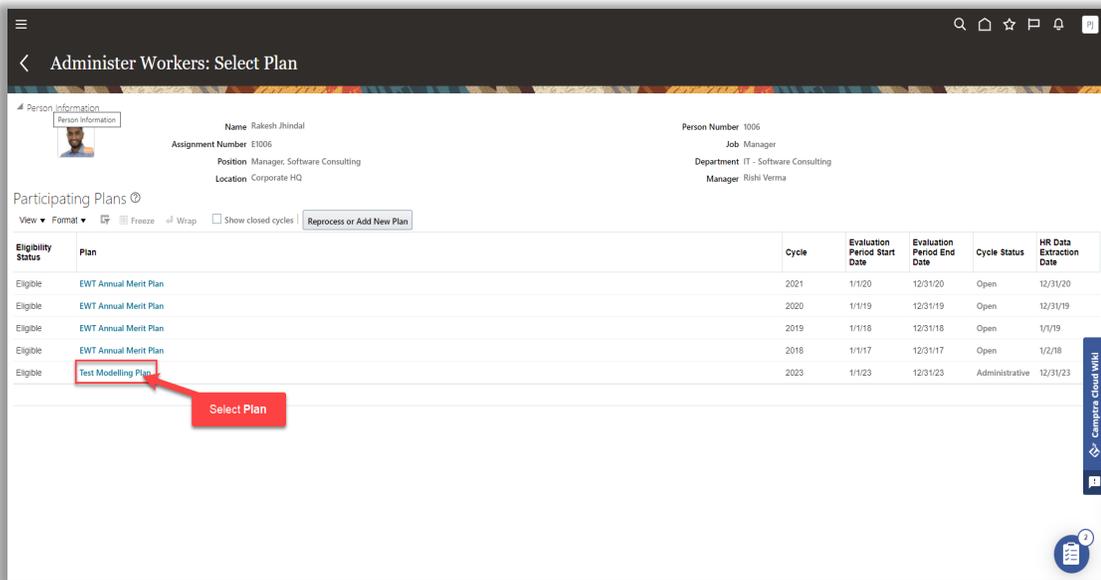
Enter the Person Number and click Search



Click Worker Name



Select the Plan



Here we can manage the worker information once the Plan is live and open for Compensation Planning. Click **Worker Information**

Administer Workers

Plan: Test Modelling Plan | Cycle: 2023 (2023-01-01 - 2023-12-31) | Exclude worker from the refresh process

Person Information

Name: Rakesh Jhindal | Person Number: 1006
 Assignment Number: E1006 | Job: Manager
 Position: Manager, Software Consulting | Department: IT - Software Consulting
 Location: Corporate HQ | Manager: Rishi Verma

Worker Information | Budget | Compensation | Status and Hierarchy | Eligibility | User-Defined Data | Notes | Alerts (1) | Audit | Statement

Worker Details | Click Worker Information

Effective Date: 12/31/23 | Gender: Male
 E-Mail: | Ethnicity: Asian
 Work Phone: | Disability Status: | Date of Birth: 1/1/81
 Person Number: 1006 | Age: 42

Employment Details

Assignment Number: E1006 | Employment Status: Full-time regular
 Department: IT - Software Consulting | Assignment Status: Active - Payroll Eligible
 Job Title: Manager | Country: United States
 Job Code: MGR | Location: Corporate HQ
 Job Change Date: 1/1/12 | Legal Employer: ERPWebTutor USA Inc.
 Years in Job: 12 | Business Unit: Camptra US Business Unit
 Position: Manager, Software Consulting | Working Hours: 40
 Position Code: MGR_SC

Here we can update the **Worker Information**. Once complete, click **Save and Close**

Administer Workers

Plan: Test Modelling Plan | Cycle: 2023 (2023-01-01 - 2023-12-31) | Exclude worker from the refresh process

Person Information

Name: Rakesh Jhindal | Person Number: 1006
 Assignment Number: E1006 | Job: Manager
 Position: Manager, Software Consulting | Department: IT - Software Consulting
 Location: Corporate HQ | Manager: Rishi Verma

Worker Information | Budget | Compensation | Status and Hierarchy | Eligibility | User-Defined Data | Notes | Alerts (1) | Audit | Statement

Worker Details | Update the applicable information below

Effective Date: 12/31/23 | Gender: Male
 E-Mail: | Ethnicity: Asian
 Work Phone: | Disability Status: | Date of Birth: 1/1/81
 Person Number: 1006 | Age: 42

Employment Details

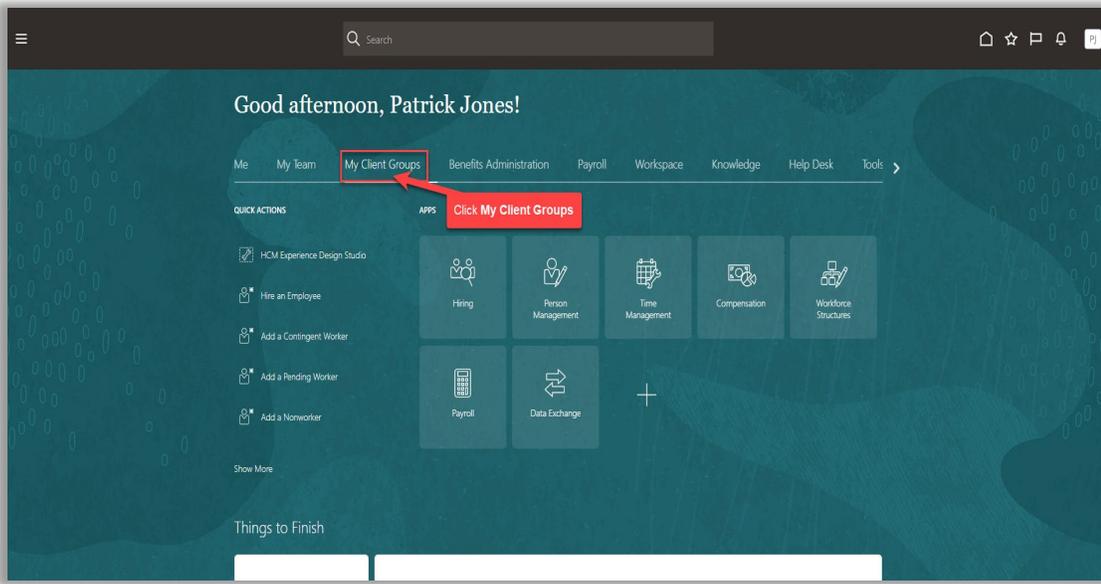
Assignment Number: E1006 | Employment Status: Full-time regular
 Department: IT - Software Consulting | Assignment Status: Active - Payroll Eligible
 Job Title: Manager | Country: United States
 Job Code: MGR | Location: Corporate HQ
 Job Change Date: 1/1/12 | Legal Employer: ERPWebTutor USA Inc.
 Years in Job: 12 | Business Unit: Camptra US Business Unit
 Position: Manager, Software Consulting | Working Hours: 40
 Position Code: MGR_SC

Click Save and Close

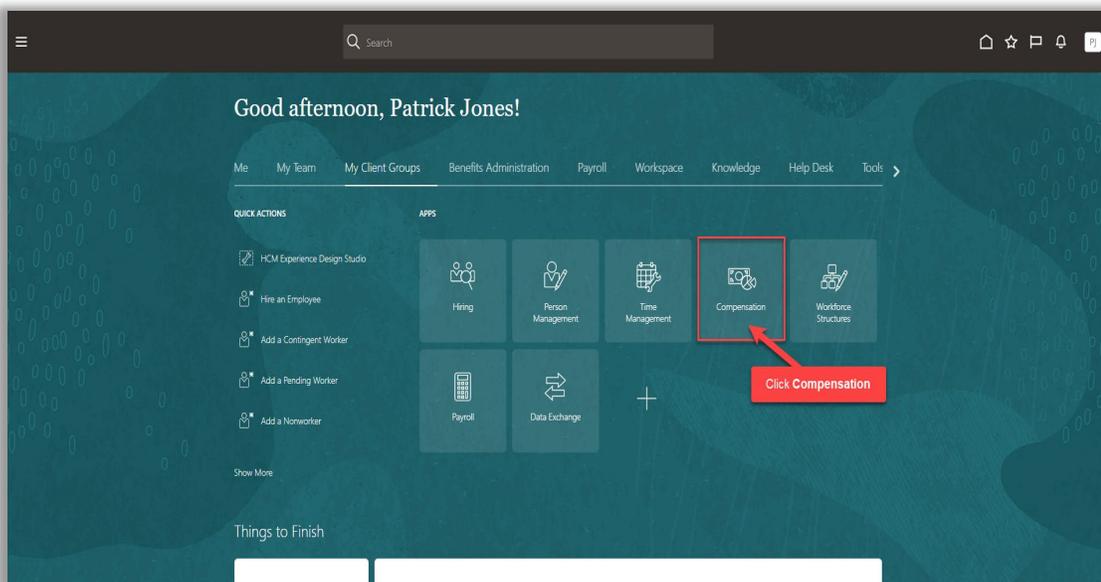
View Budget Information

Navigation: Home>My Client Groups>Compensation>Administer Workers>Search Worker>Select Worker>Select Plan>Budget>Update>Save and Close

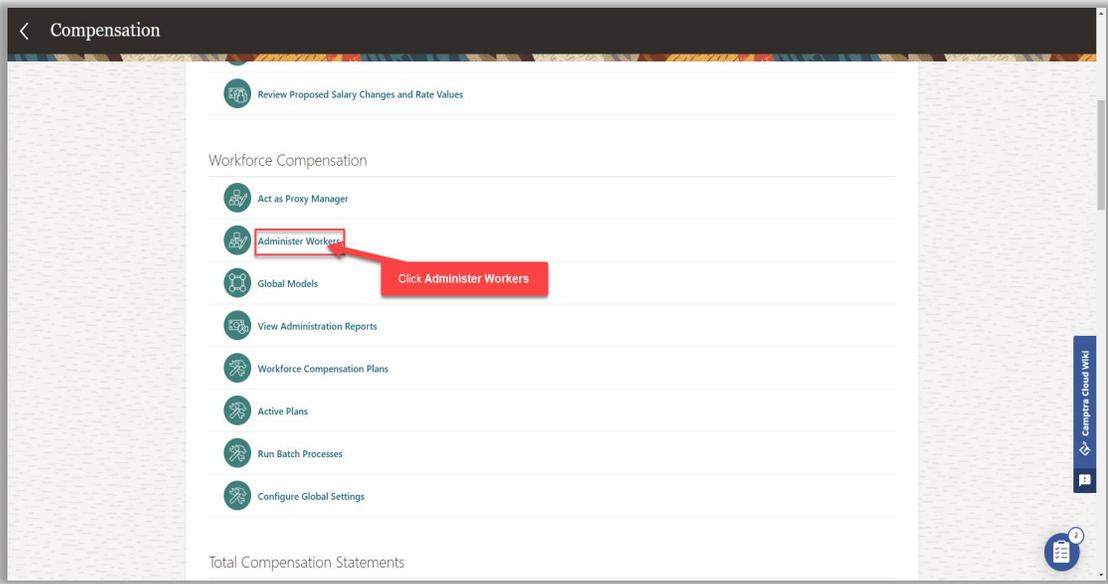
From the home screen, click **My Client Groups**



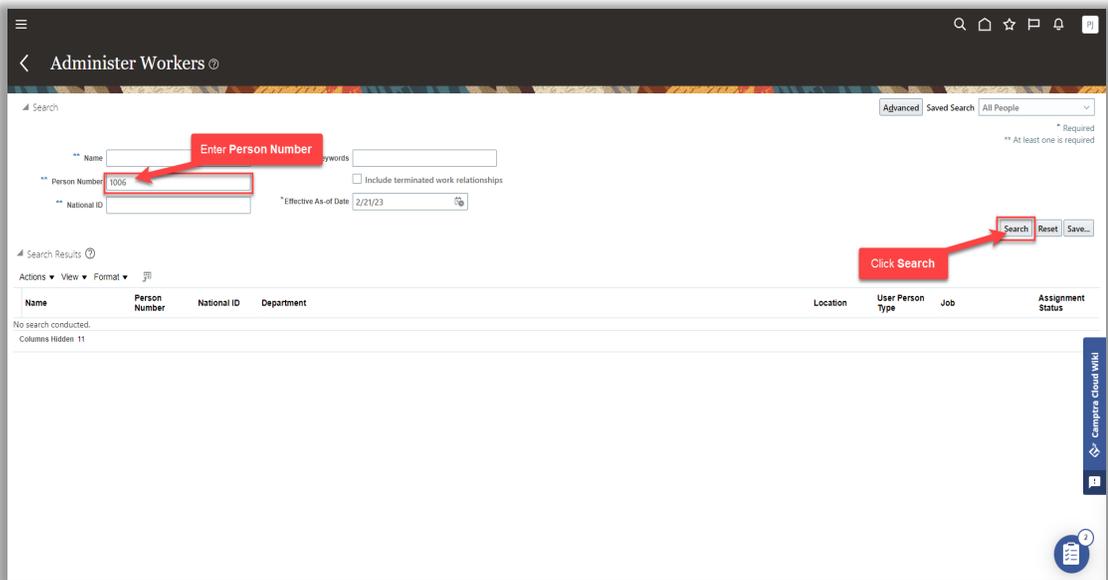
Next, click **Compensation**



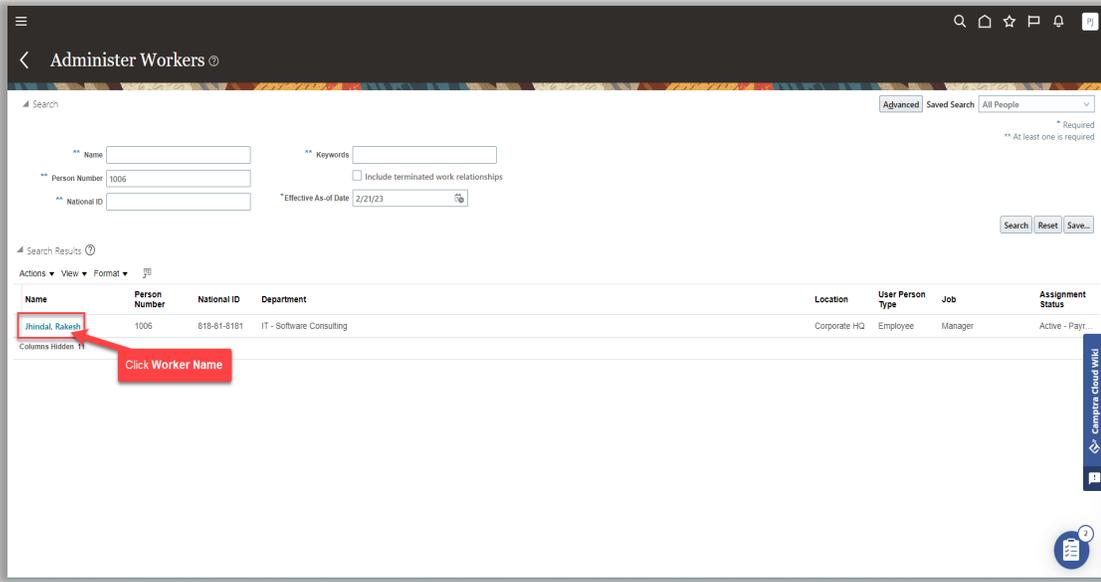
Under **Workforce Compensation**, click **Administer Workers**. We can also search for **Administer Workers** using the search bar on the top left of the page



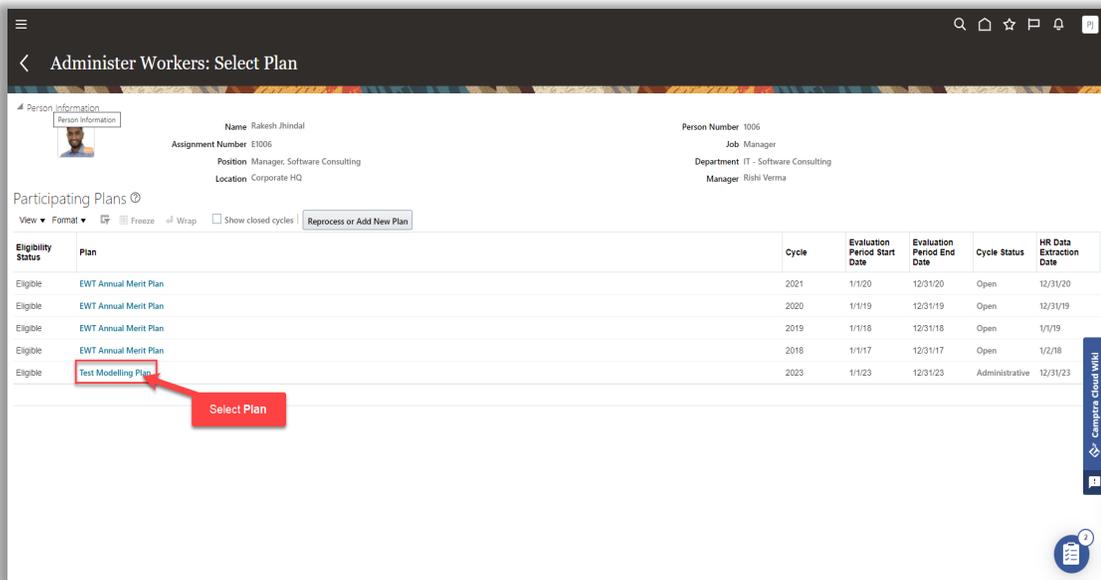
Enter the **Person Number** and click **Search**



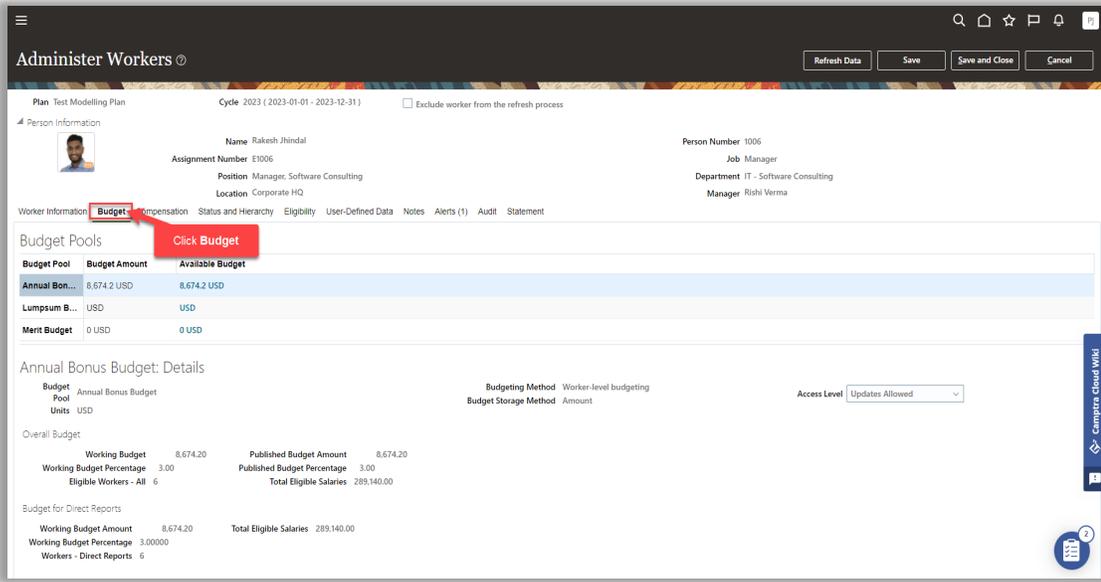
Click **Worker Name**



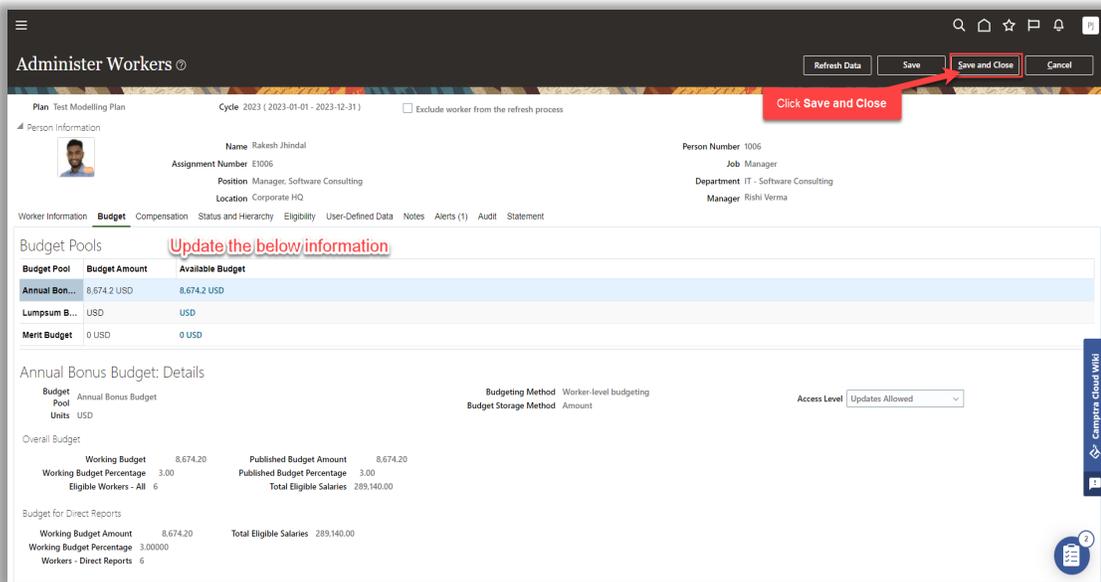
Select the Plan



Here we can manage the worker information once the Plan is live and open for Compensation Planning. Click **Budget**



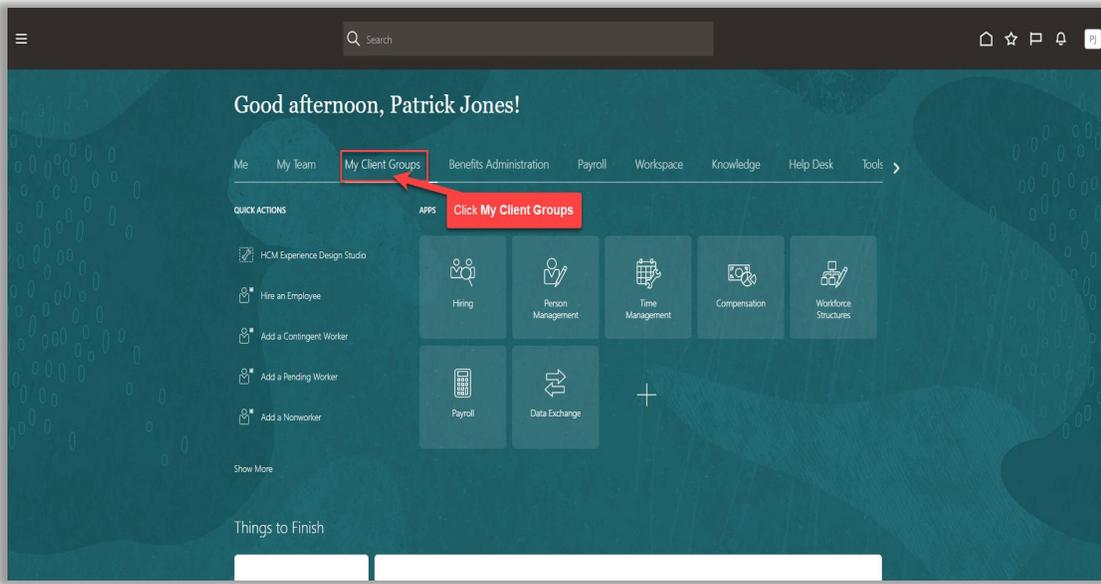
Here we can view the **Budget** Information and update the Access level, if applicable. Once complete, click **Save and Close**



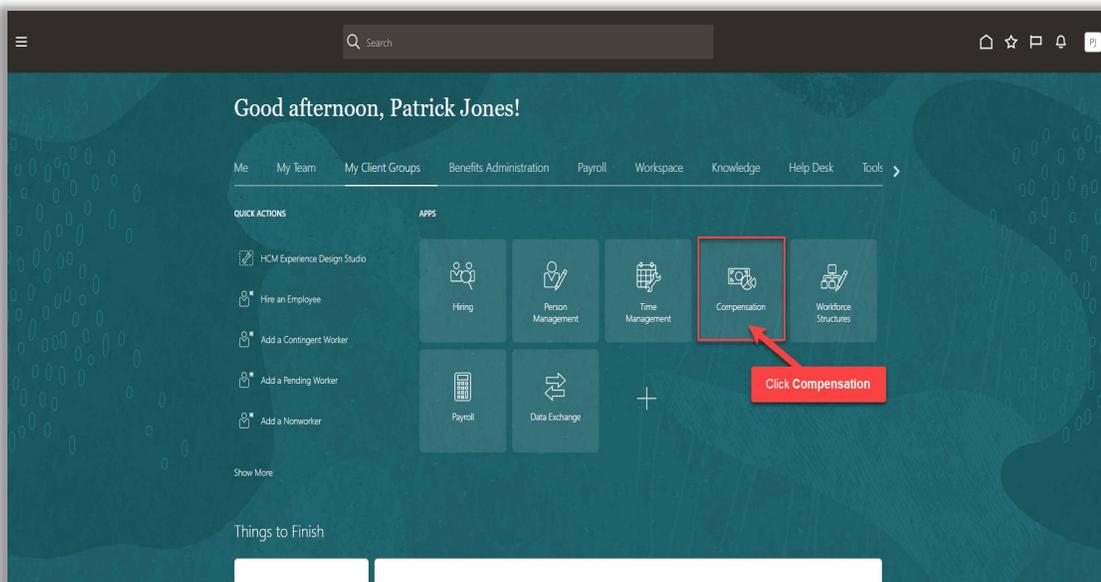
Update Worker Compensation

Navigation: Home>My Client Groups>Compensation>Administer Workers>Search Worker>Select Worker>Select Plan>Compensation>Update>Save and Close

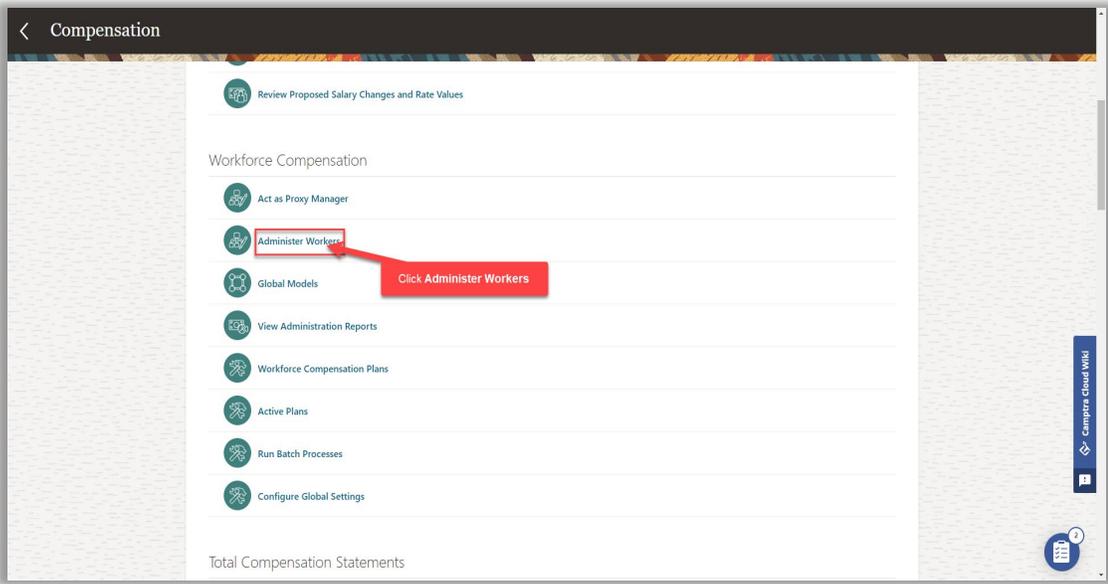
From the home screen, click **My Client Groups**



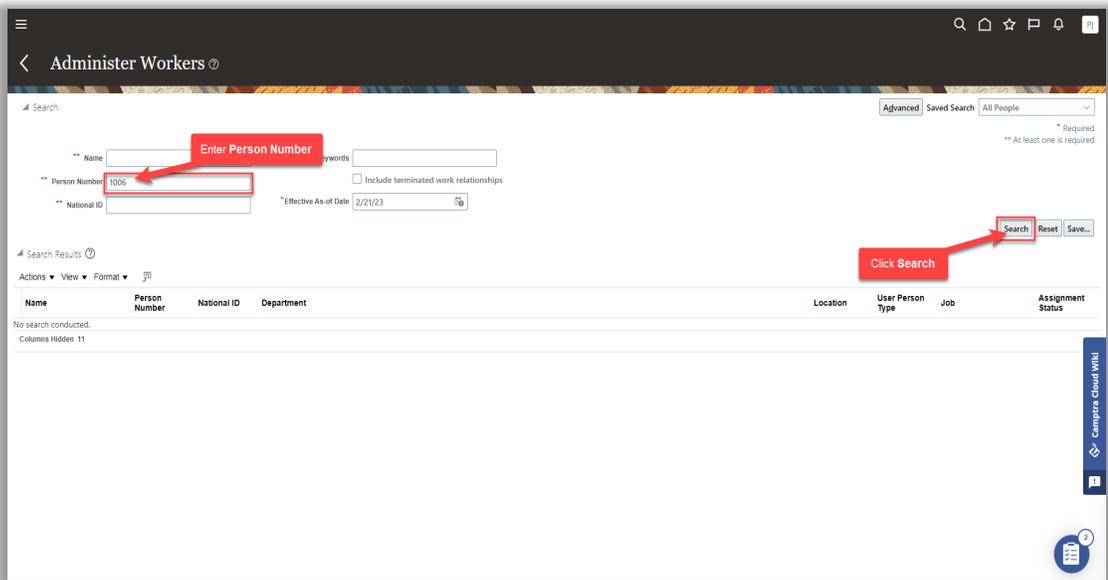
Next, click **Compensation**



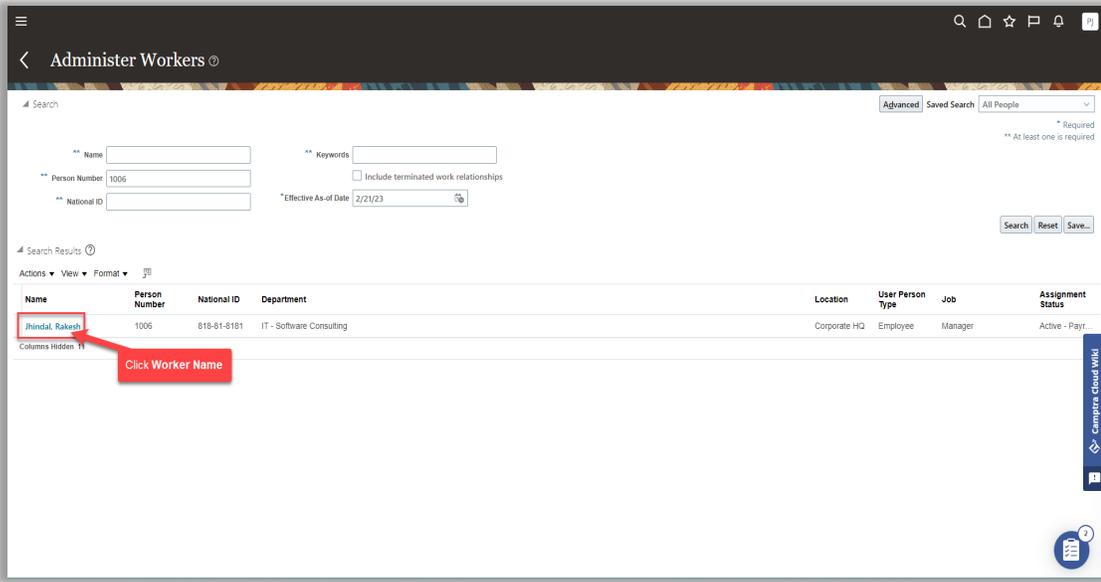
Under **Workforce Compensation**, click **Administer Workers**. We can also search for **Administer Workers** using the search bar on the top left of the page



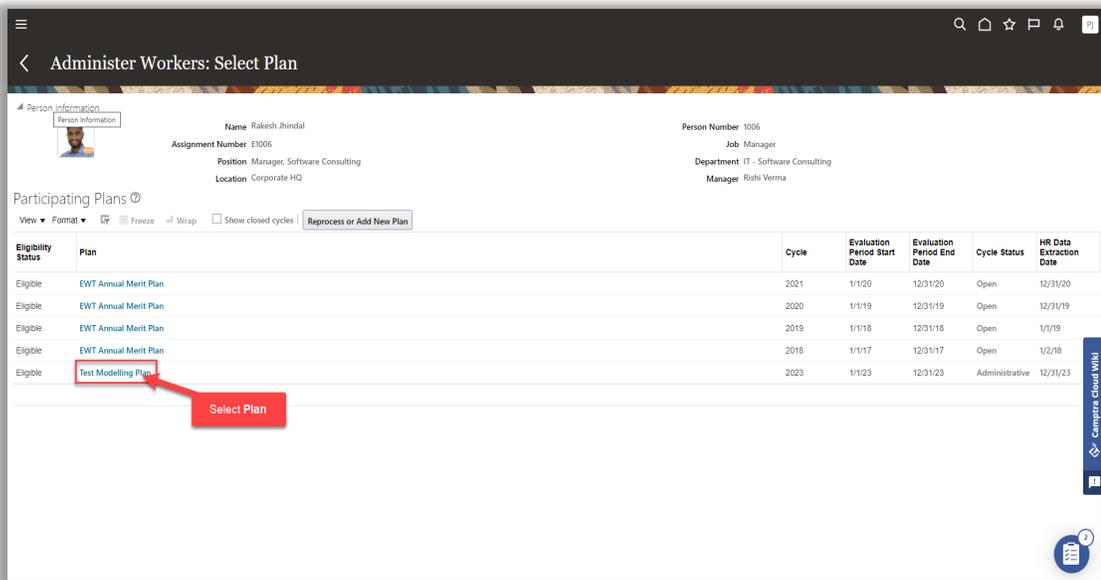
Enter the **Person Number** and click **Search**



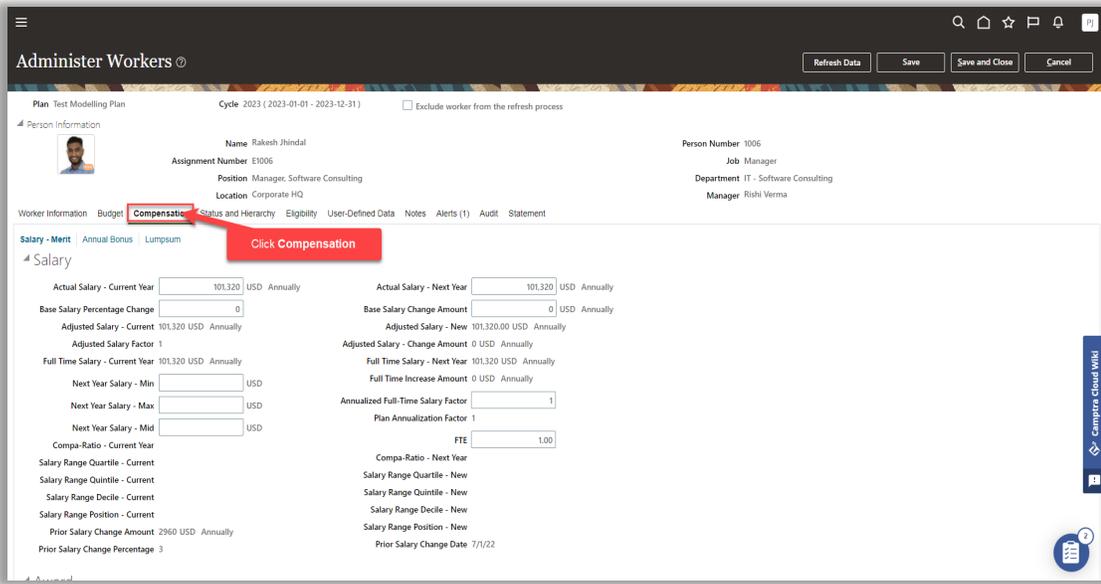
Click **Worker Name**



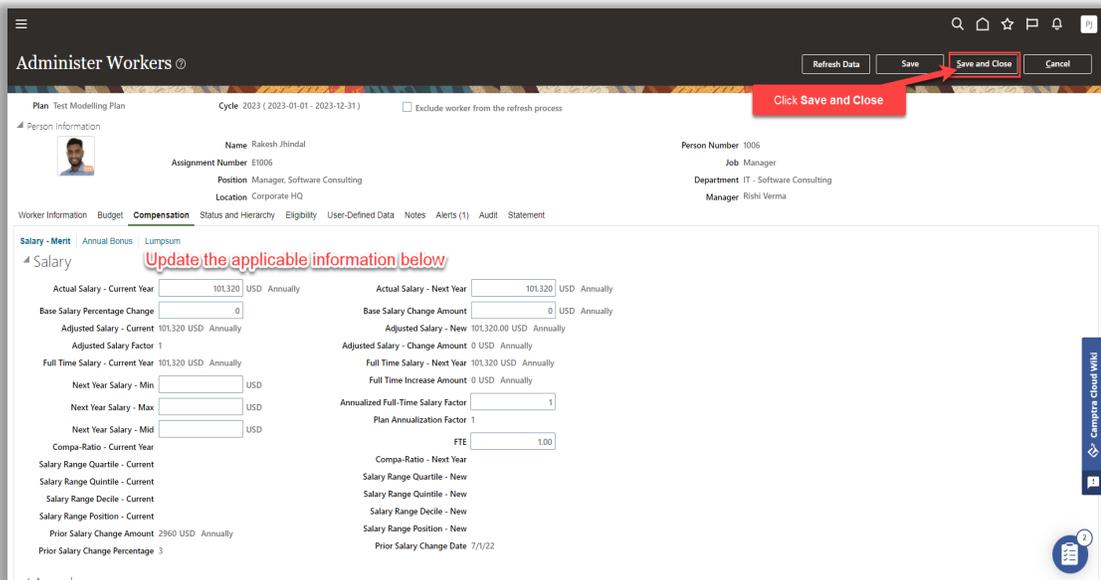
Select the Plan



Here we can manage the worker information once the Plan is live and open for Compensation Planning. Click **Compensation**



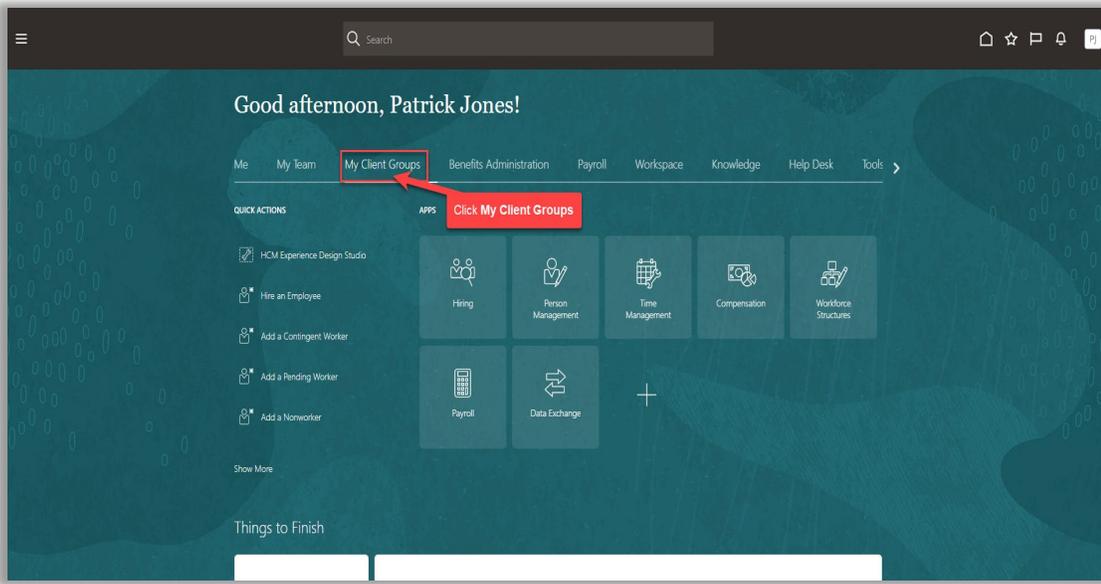
Here we can view the **Compensation Information**. We can update the information and once complete, click **Save and Close**



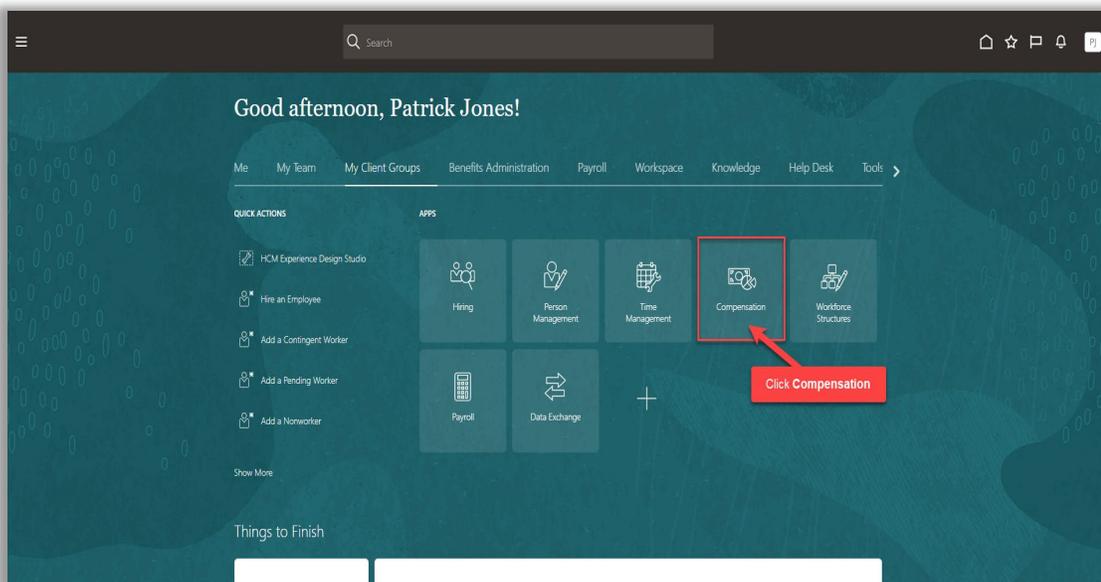
Update Compensation Manager

Navigation: Home>My Client Groups>Compensation>Administer Workers>Search Worker>Select Worker>Select Plan>Status & Hierarchy>Update>Save and Close

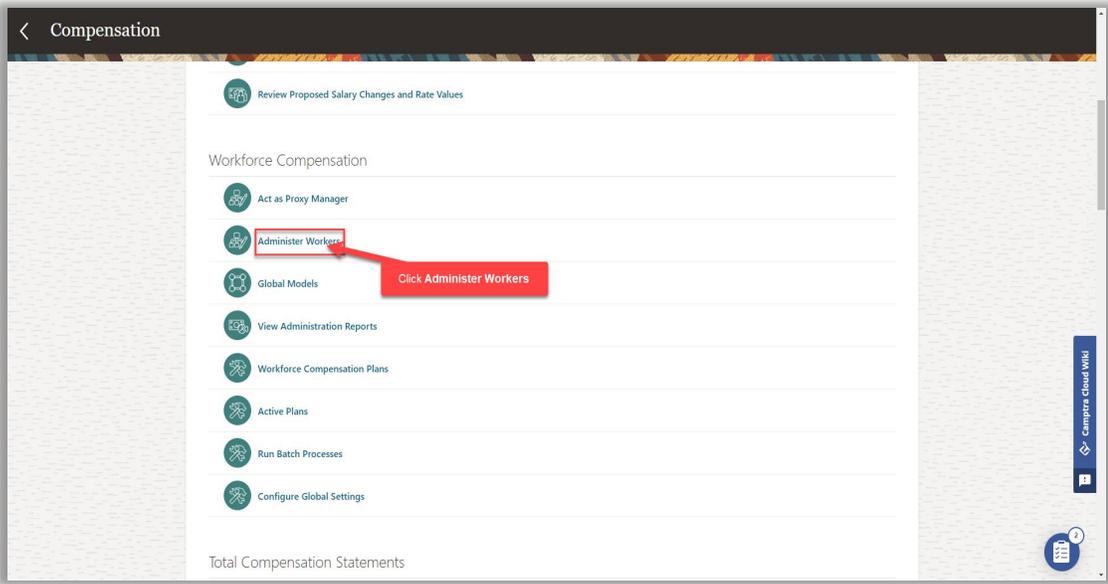
From the home screen, click **My Client Groups**



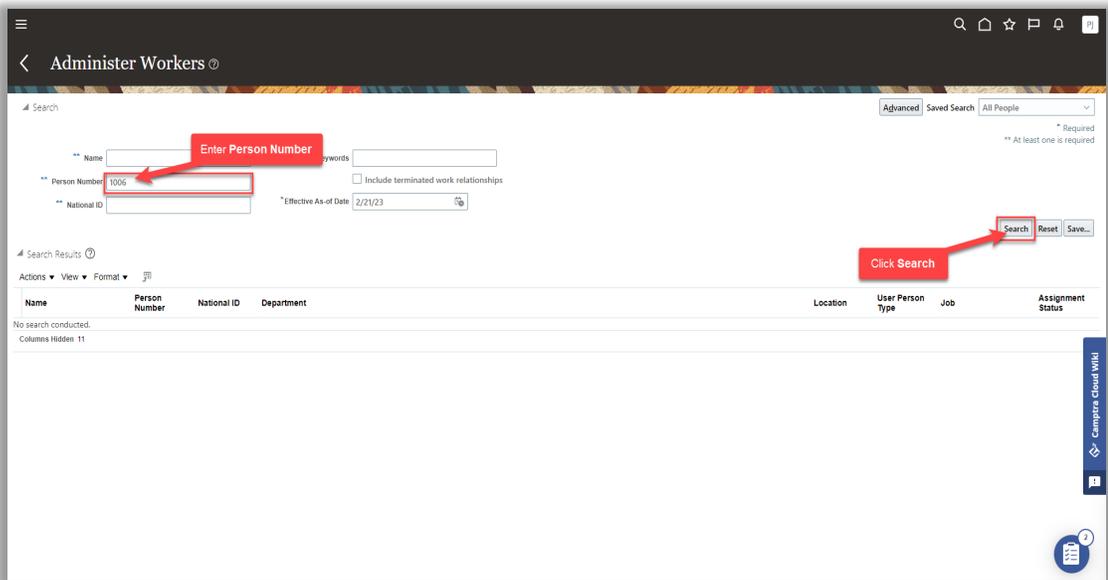
Next, click **Compensation**



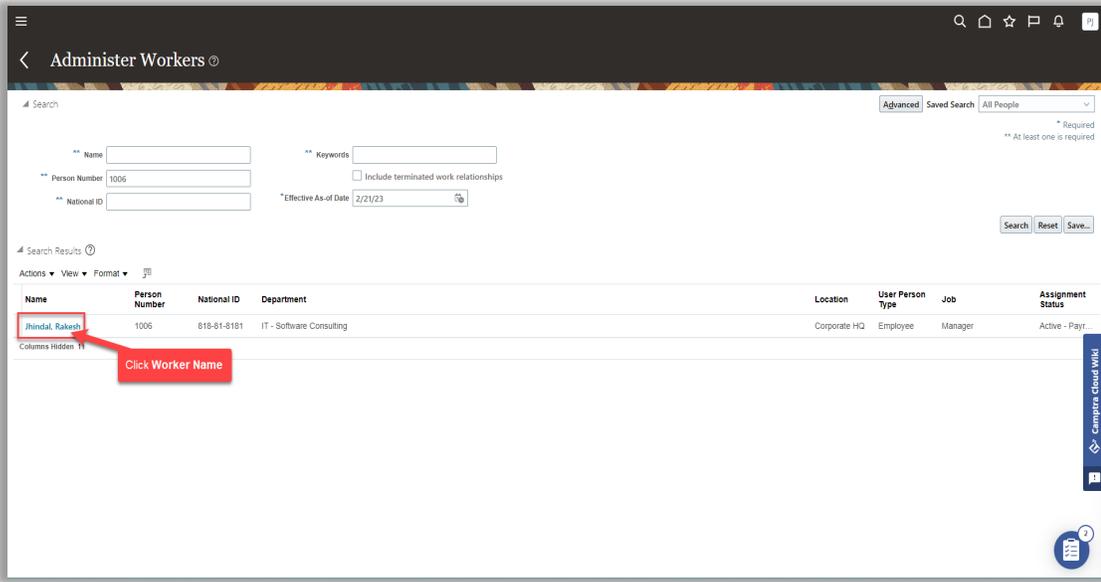
Under **Workforce Compensation**, click **Administer Workers**. We can also search for **Administer Workers** using the search bar on the top left of the page



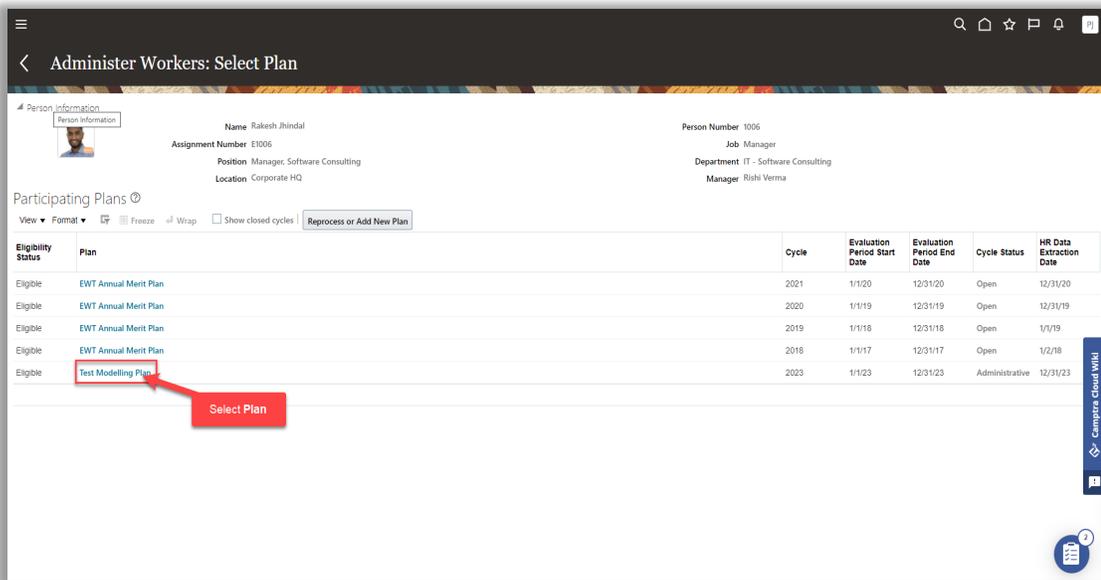
Enter the **Person Number** and click **Search**



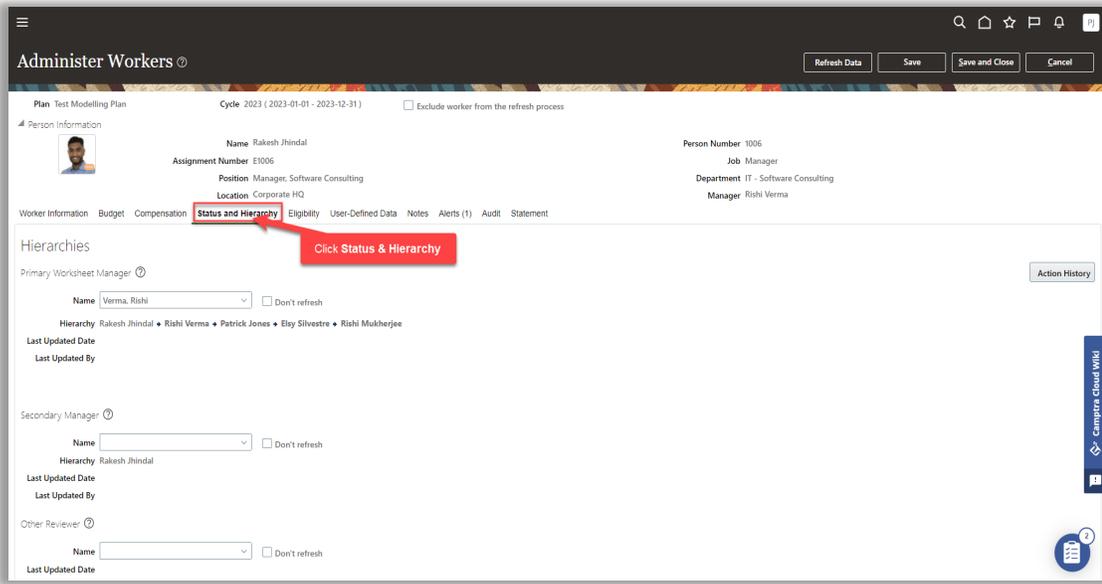
Click **Worker Name**



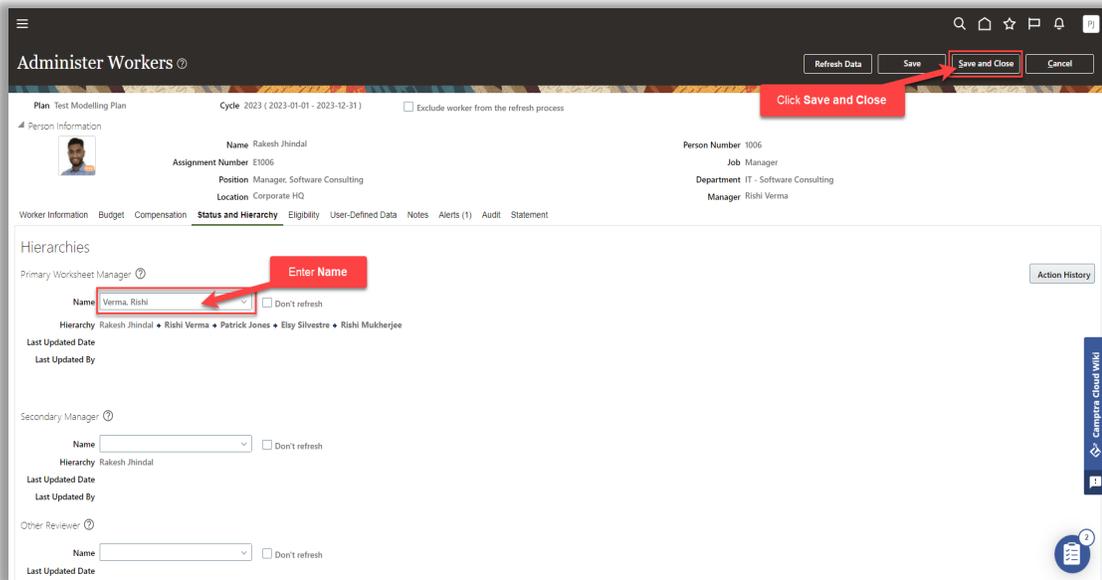
Select the Plan



Here we can manage the worker information once the Plan is live and open for Compensation Planning. Click **Status & Hierarchy**



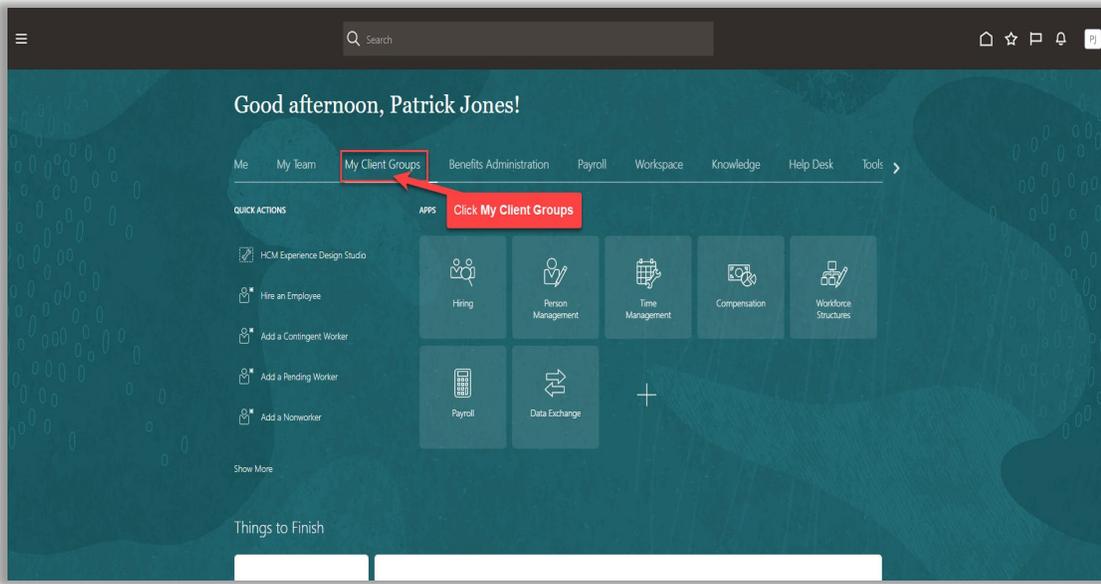
Here we can view the **Worksheet Manager Information**. We can search for the new worksheet manager by entering the new manager's name in the **Name** box. Once complete, click **Save and Close**



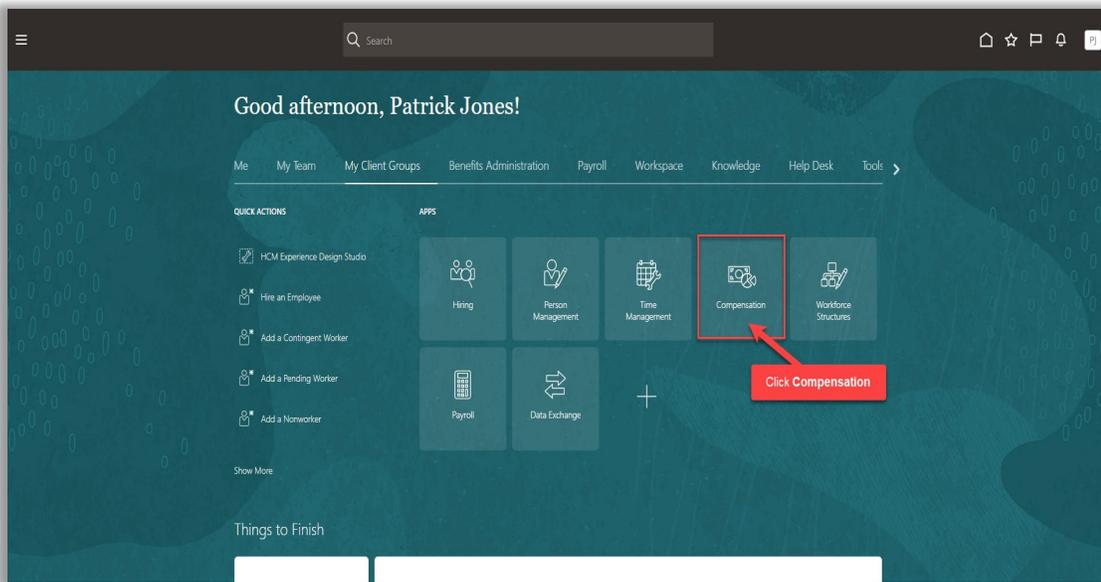
Update Plan Eligibility

Navigation: Home>My Client Groups>Compensation>Administer Workers>Search Worker>Select Worker>Select Plan>Eligibility>Update>Save and Close

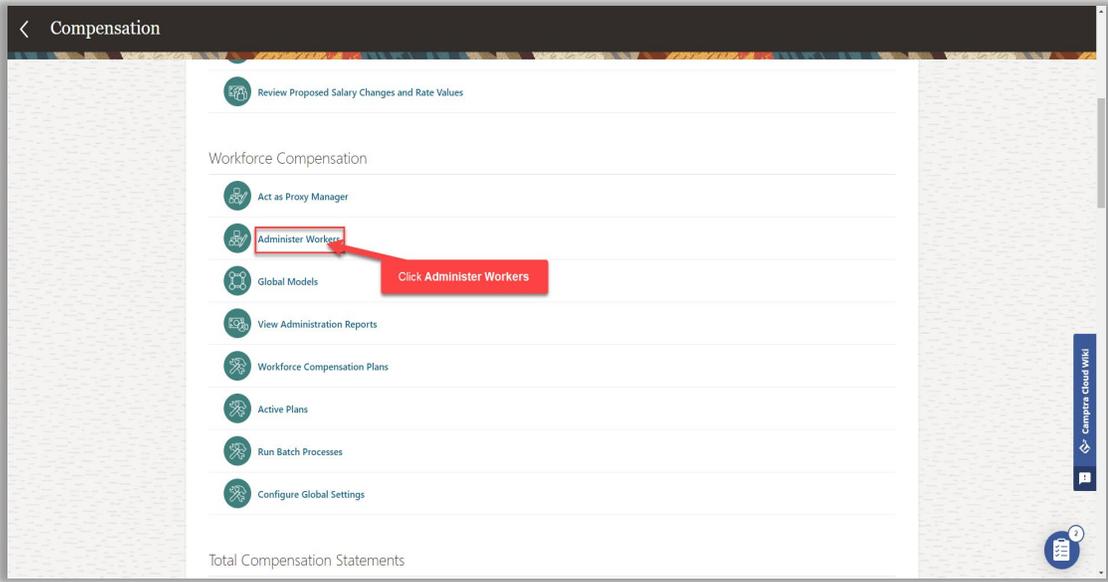
From the home screen, click **My Client Groups**



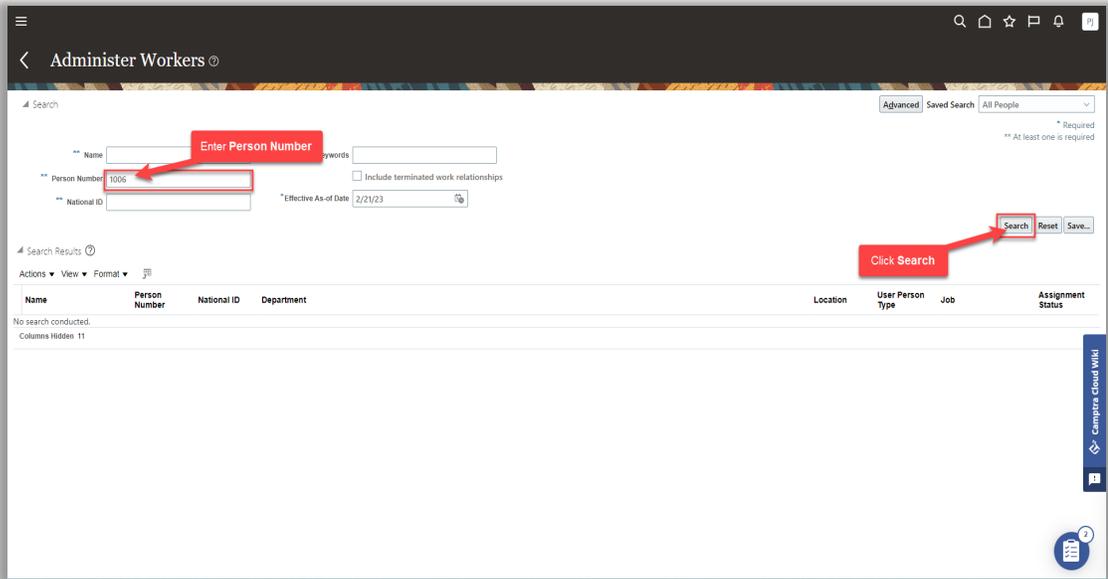
Next, click **Compensation**



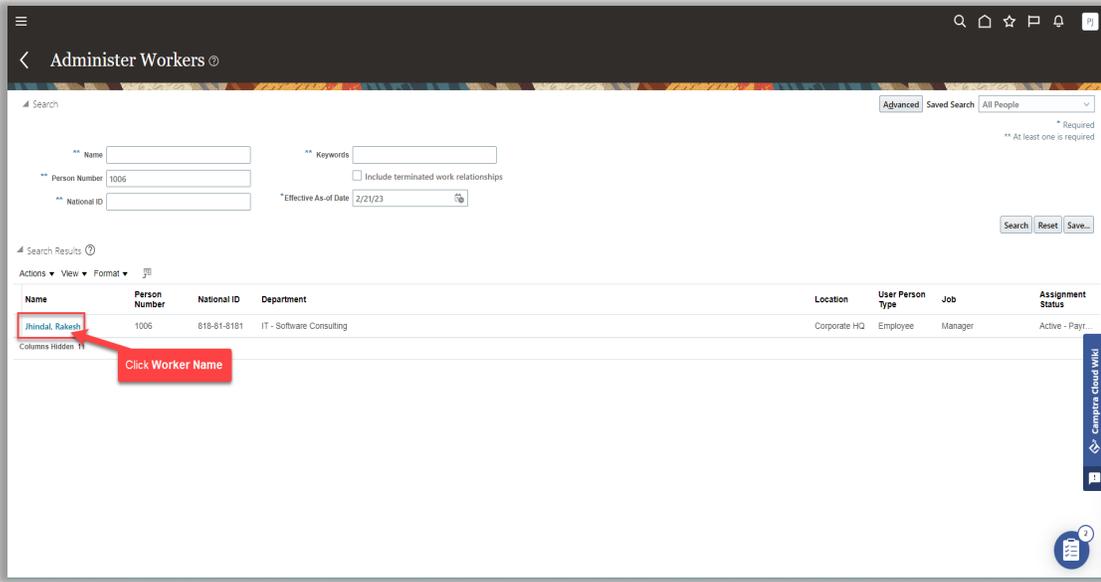
Under **Workforce Compensation**, click **Administer Workers**. We can also search for **Administer Workers** using the search bar on the top left of the page



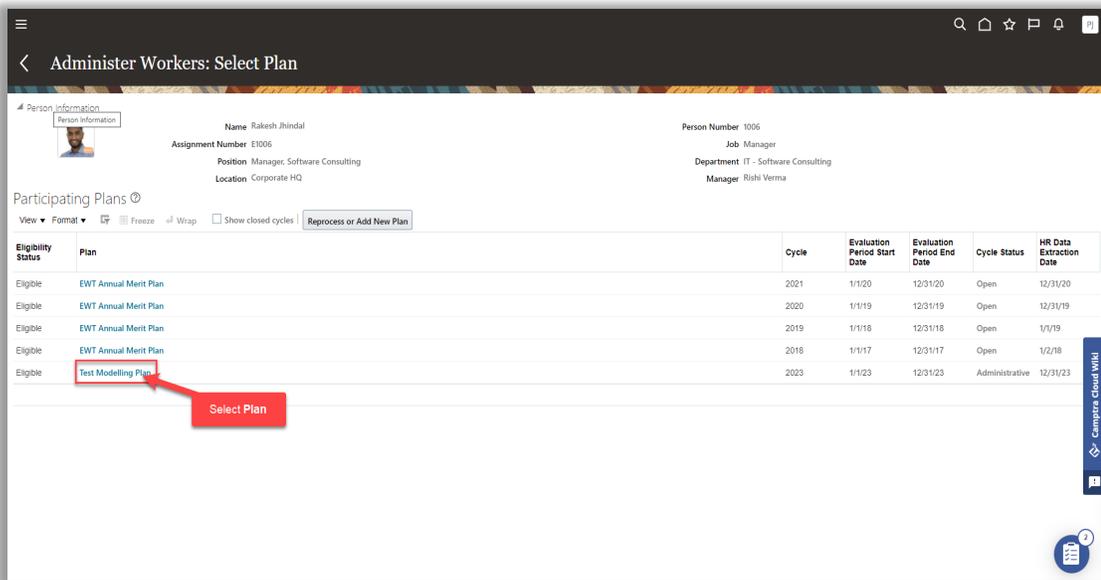
Enter the **Person Number** and click **Search**



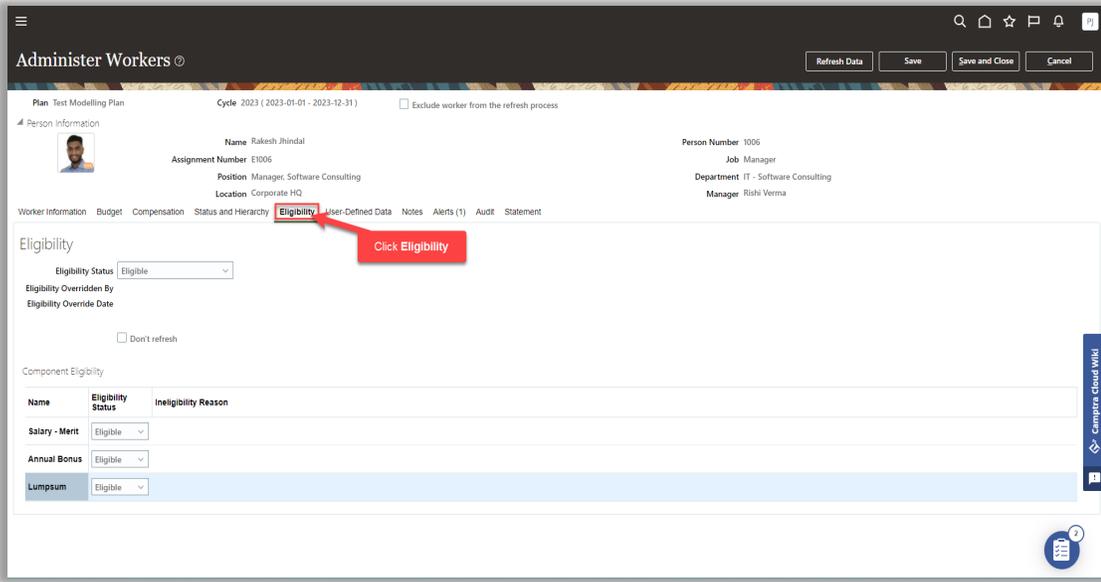
Click **Worker Name**



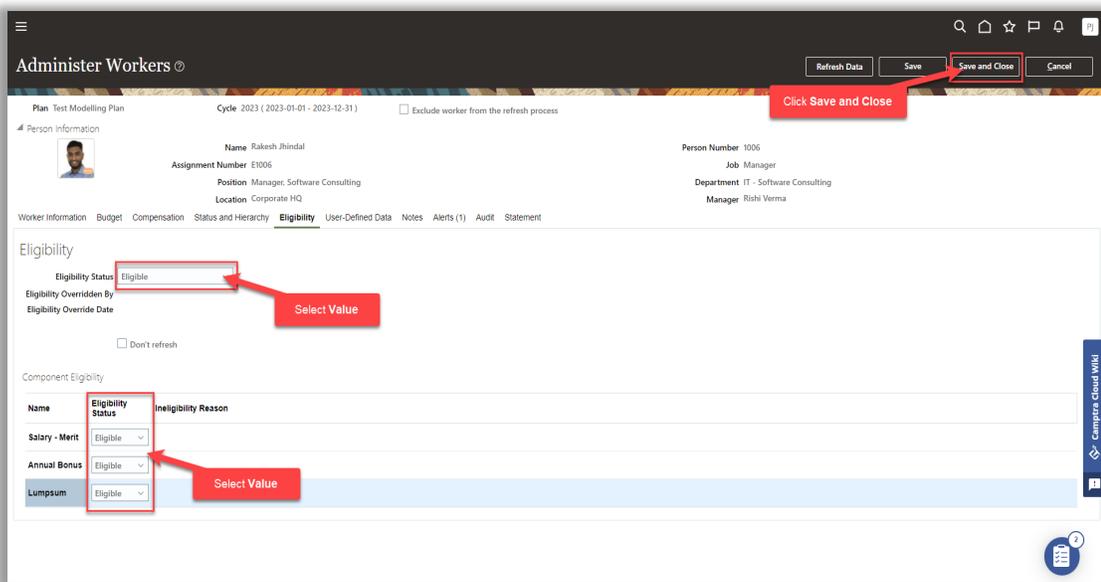
Select the Plan



Here we can manage the worker information once the Plan is live and open for Compensation Planning. Click **Eligibility**



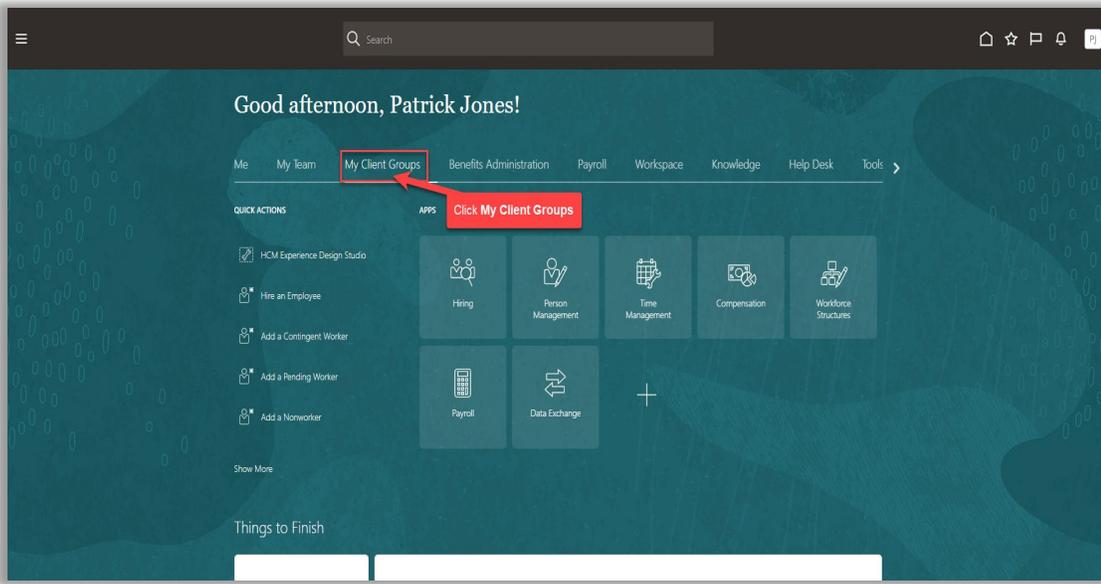
Here we can view the **Eligibility** Information. We can change the overall eligibility for all plans by changing the **Eligibility Status**. Or we can change the eligibility for the individual worksheets under **Component Eligibility**. Once complete, click **Save and Close**



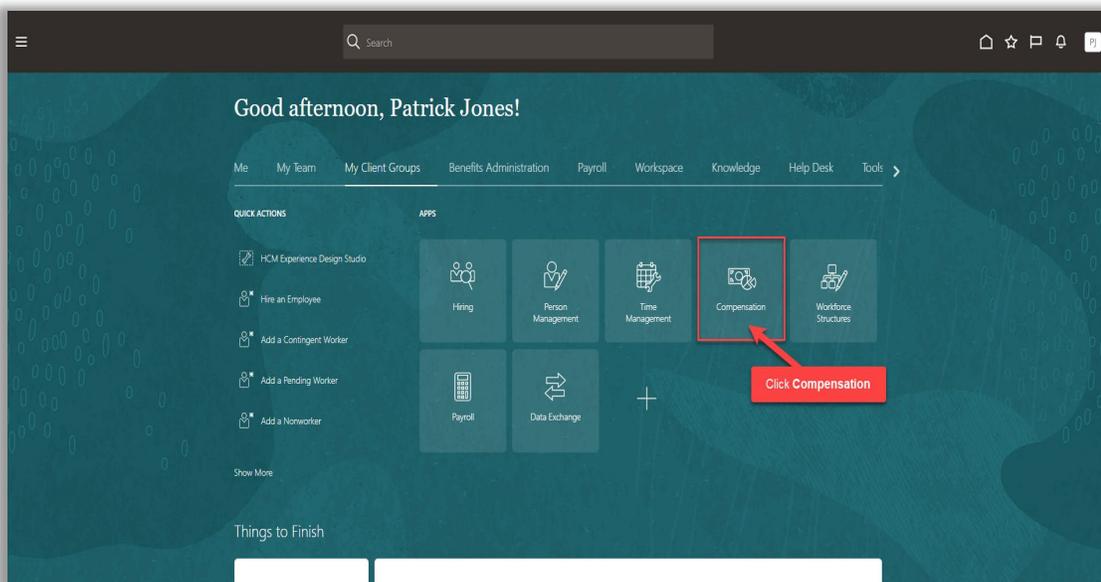
View Alerts For An Employee

Navigation: Home>My Client Groups>Compensation>Administer Workers>Search Worker>Select Worker>Select Plan>Alerts>Update>Save and Close

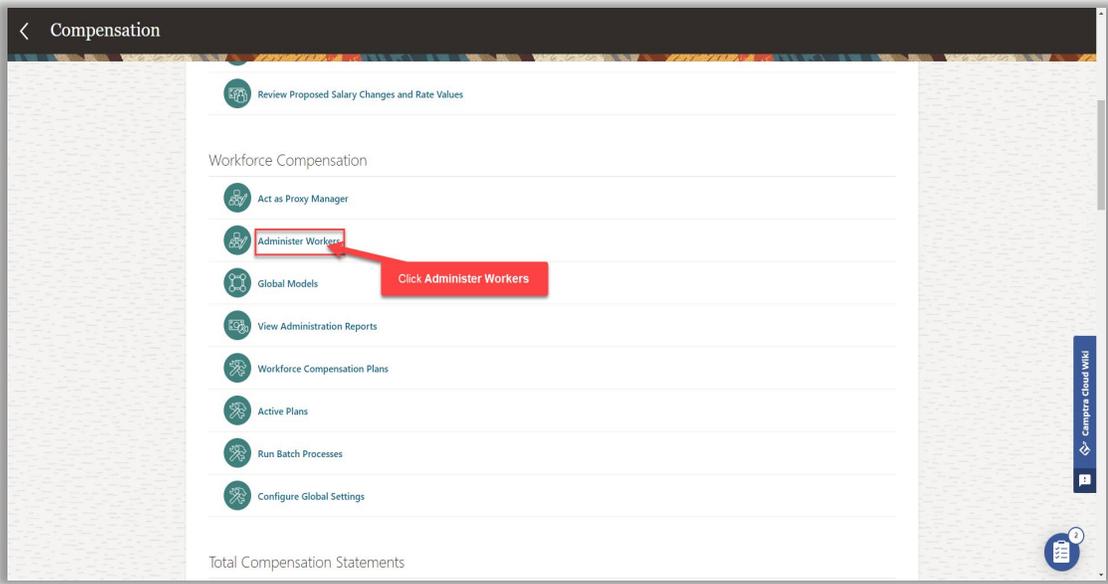
From the home screen, click **My Client Groups**



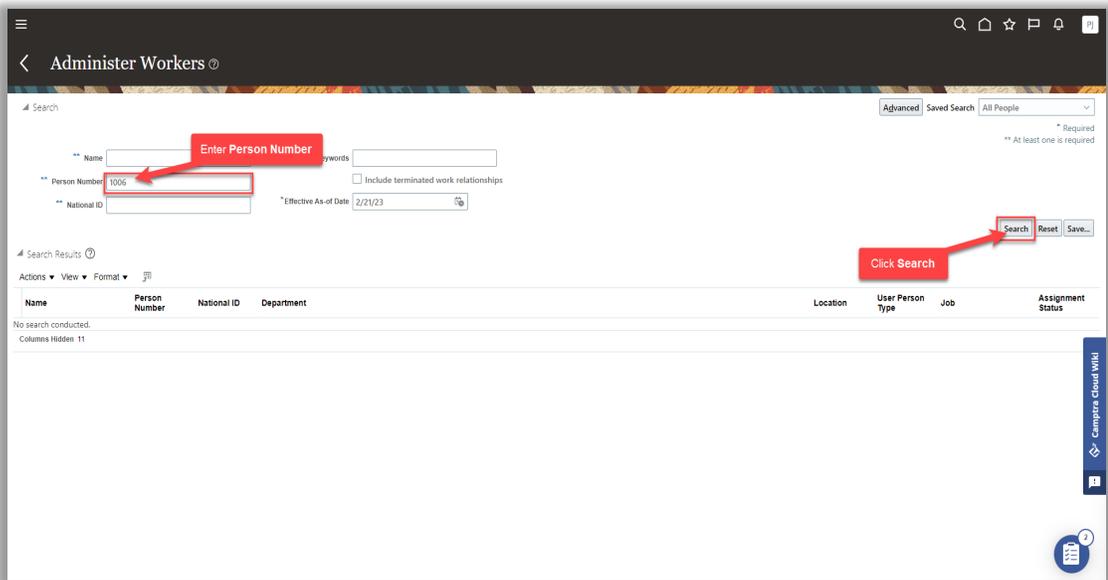
Next, click **Compensation**



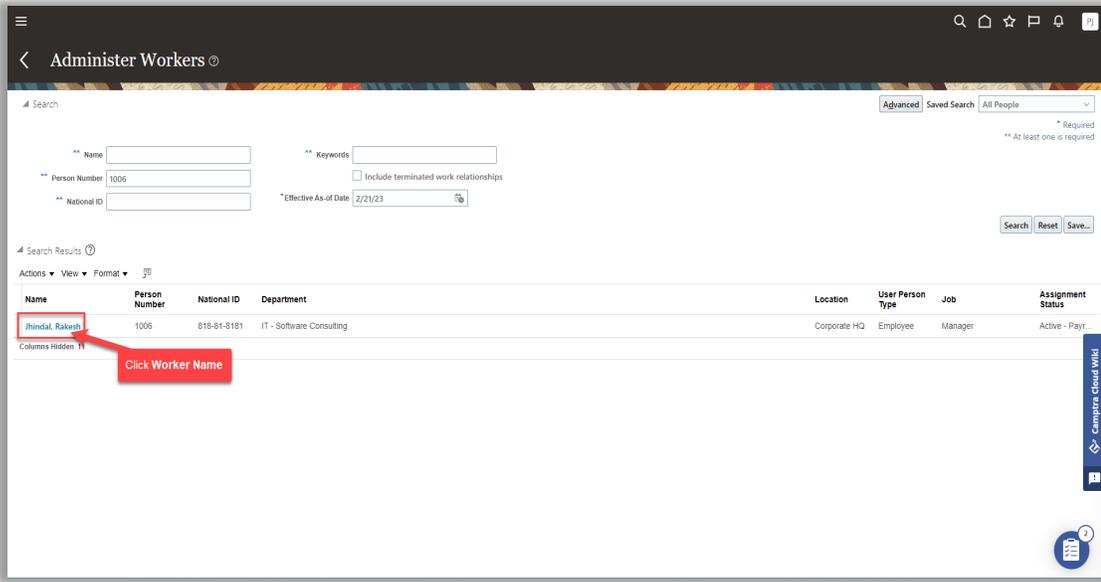
Under **Workforce Compensation**, click **Administer Workers**. We can also search for **Administer Workers** using the search bar on the top left of the page



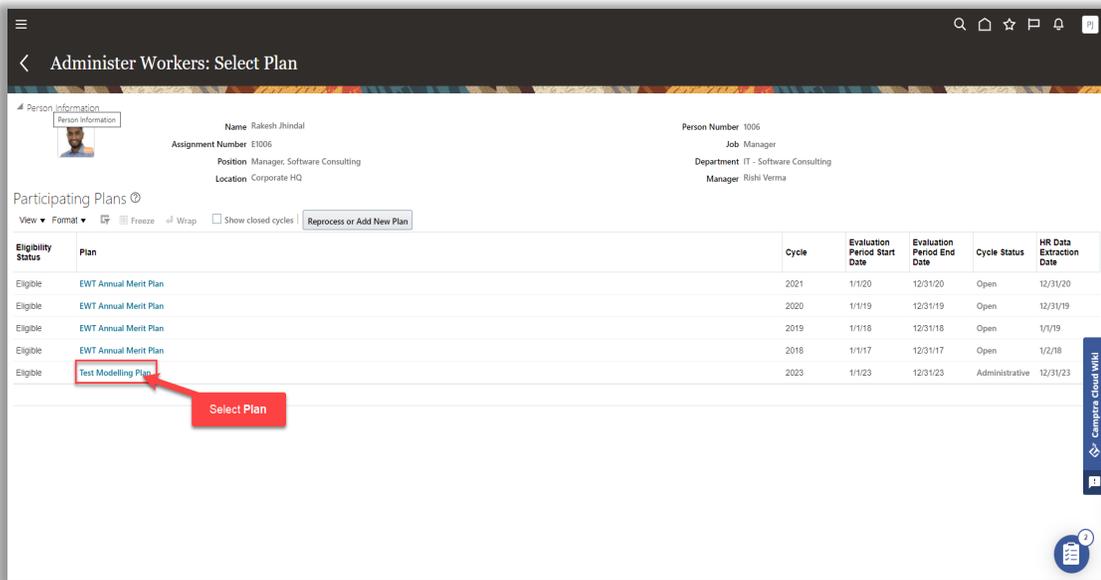
Enter the **Person Number** and click **Search**



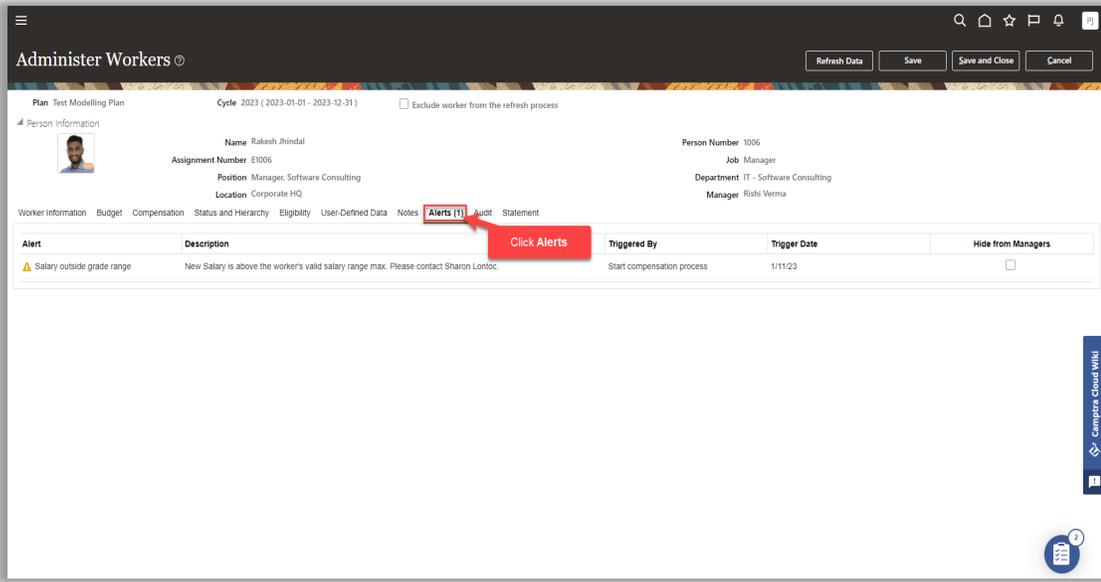
Click **Worker Name**



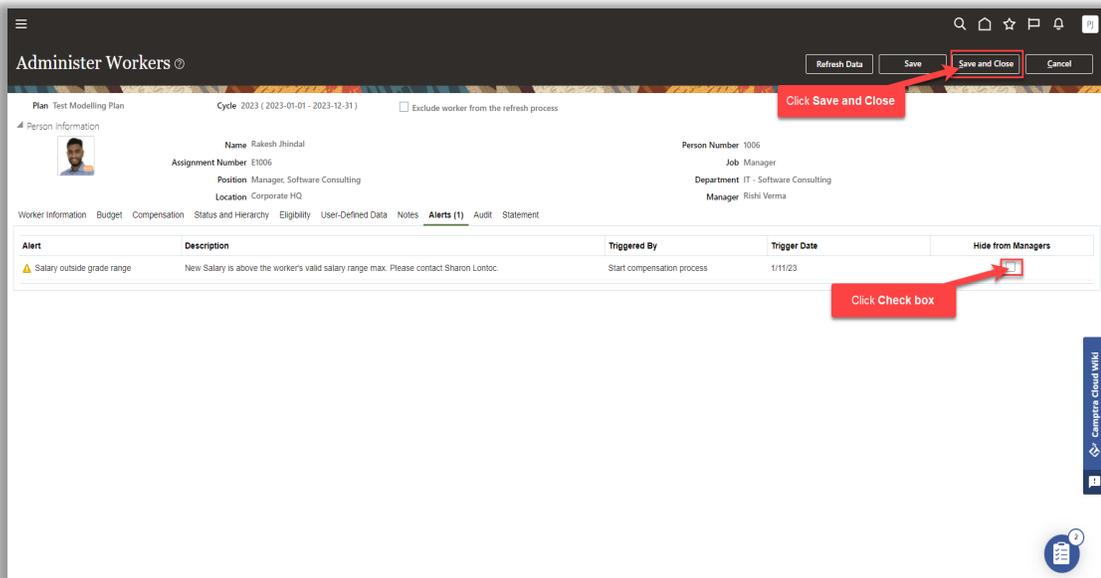
Select the Plan



Here we can manage the worker information once the Plan is live and open for Compensation Planning. Click Alerts



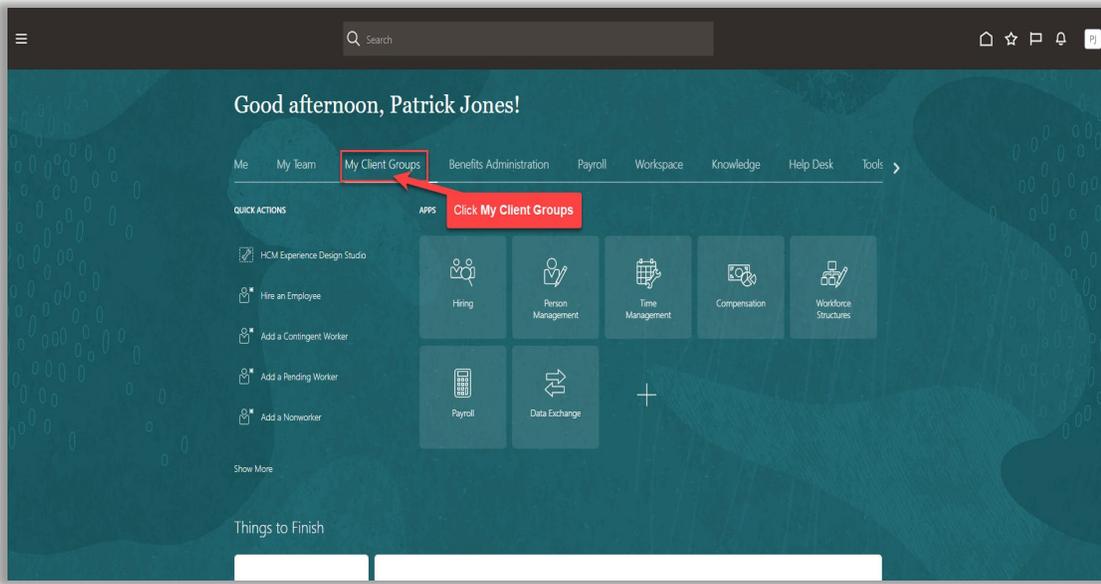
Here we can view the Alerts Information. We can Hide from Mangers, if applicable. Once complete, click **Save and Close**



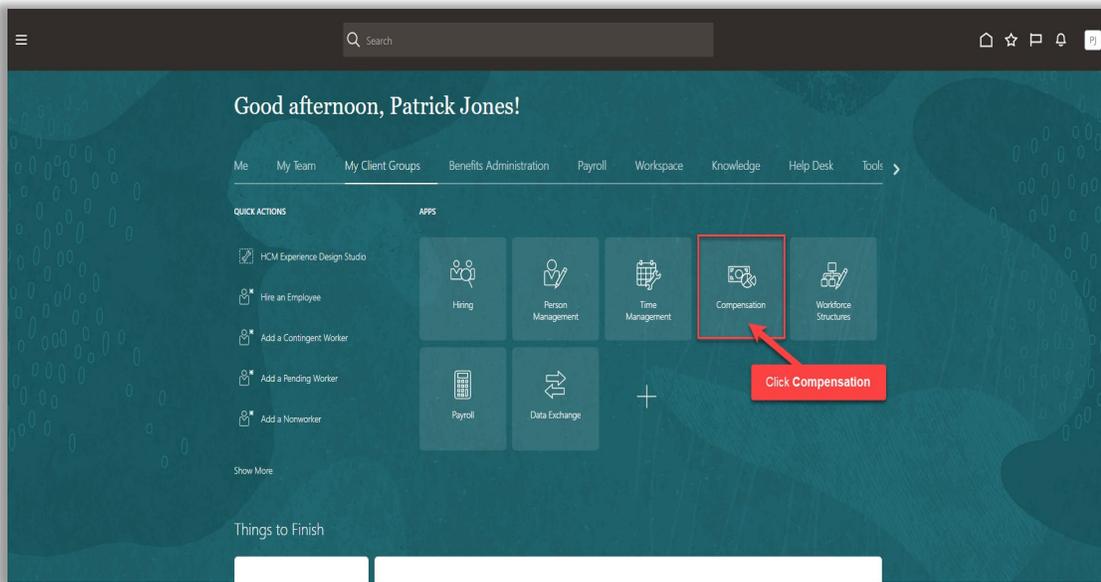
View Compensation Statements

Navigation: Home>My Client Groups>Compensation>Administer Workers>Search Worker>Select Worker>Select Plan>Statement>Update>Save and Close

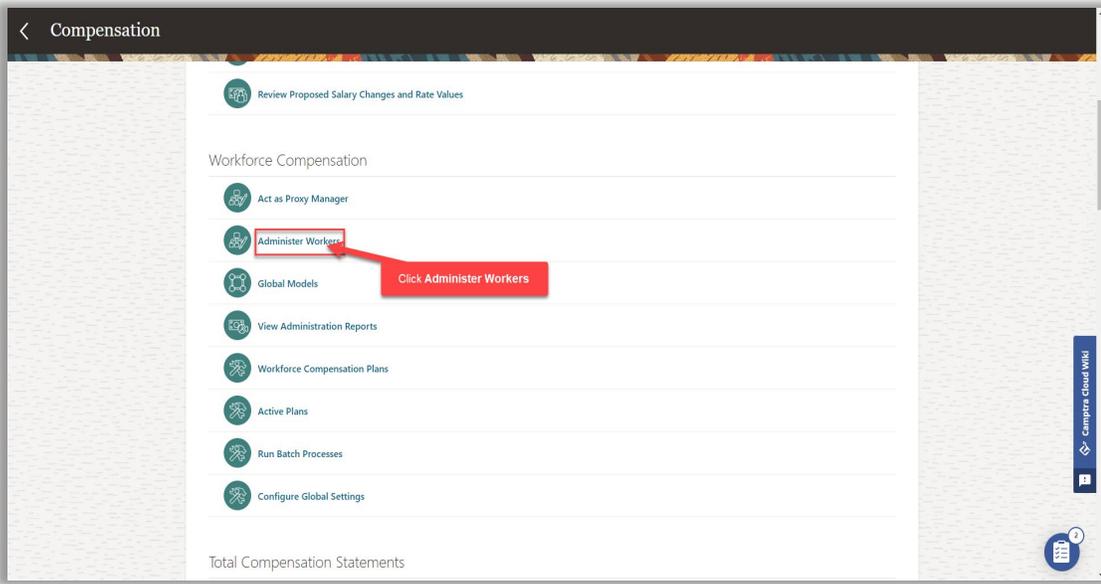
From the home screen, click **My Client Groups**



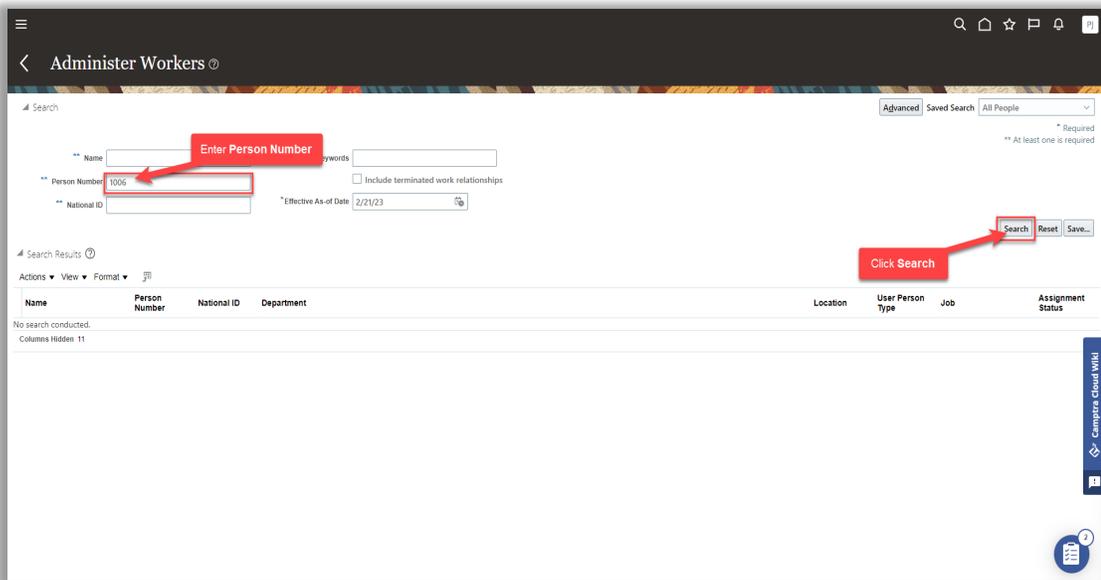
Next, click **Compensation**



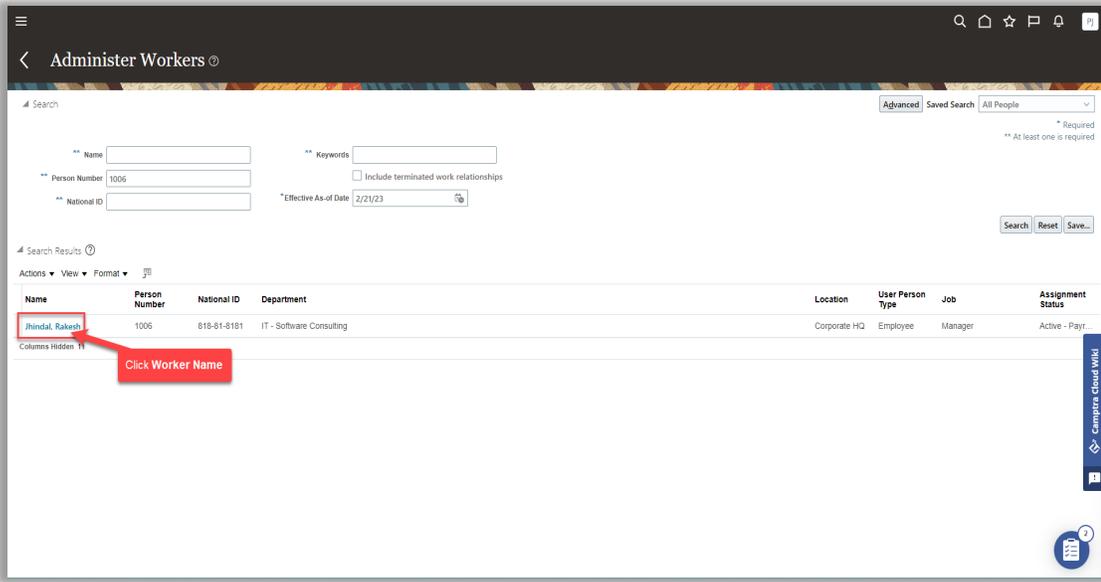
Under **Workforce Compensation**, click **Administer Workers**. We can also search for **Administer Workers** using the search bar on the top left of the page



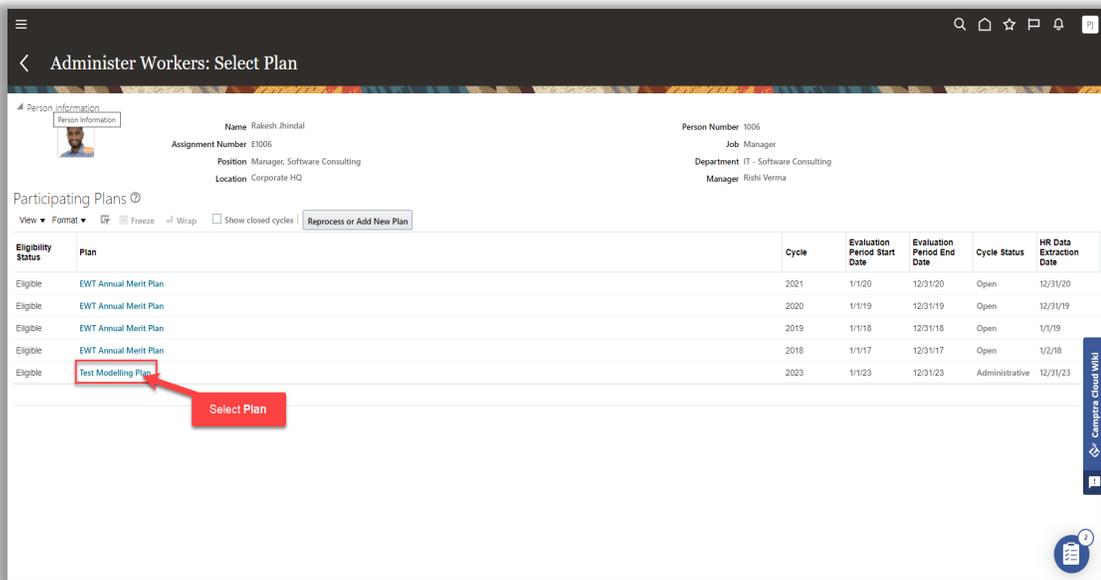
Enter the **Person Number** and click **Search**



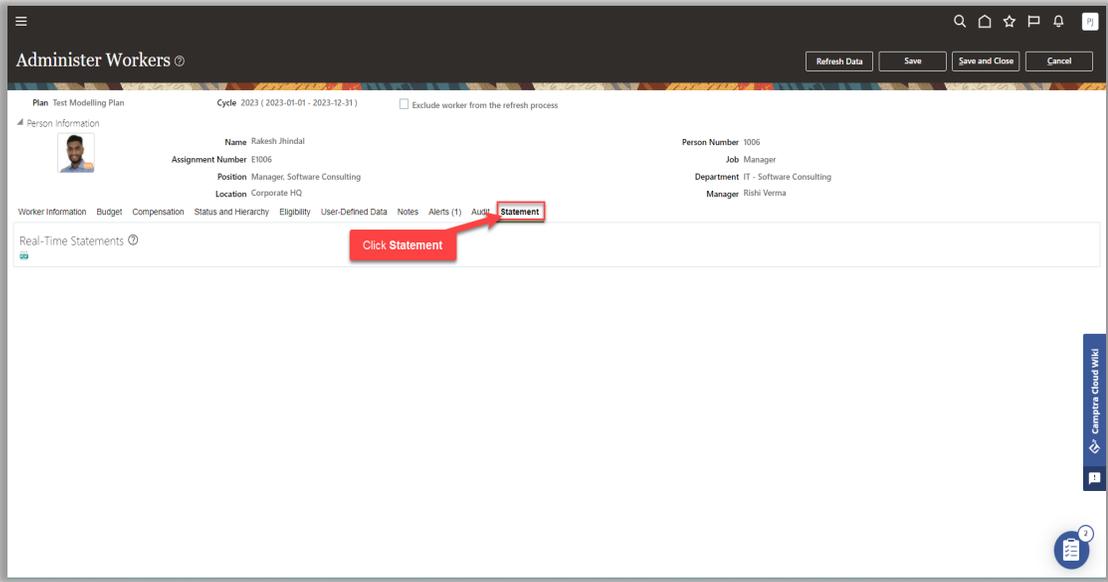
Click **Worker Name**



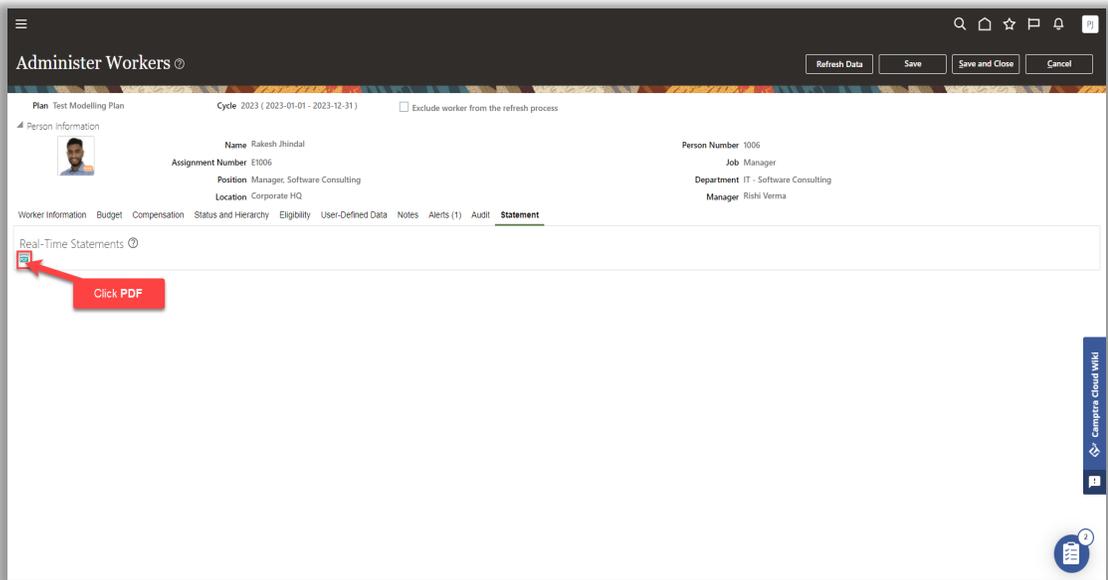
Select the Plan



Here we can manage the worker information once the Plan is live and open for Compensation Planning. Click **Statement**



Here we can view the **Compensation Statement Information**. We can view the Statements by clicking **PDF**



Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at learn@camptratech.com

Version History	Revision Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version