Salary Planning in PeopleSoft:

Creating and Interpreting Reports

August, 2007

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Section 1 – Navigating to Reports

Once you have logged-in to Peoplesoft, go to **Compensation** → **Base Compensation** → **SOG Reports**.

Under **SOG Reports,** you will be able to choose one of the following eight reports: **Cost of Reduced Salary Increase, Cost of Salary Increases, Employee Review Audit, Employees by Increase Rating/Recommendation**, **Increase Distribution Summary**, **Preliminary Exception List, Salary Increase List** or **Salary Increase List by Type.**

NOTE: Before you run any report, you may want to get a screen print of the report panel. This way, you will have a record of exactly what you asked for.

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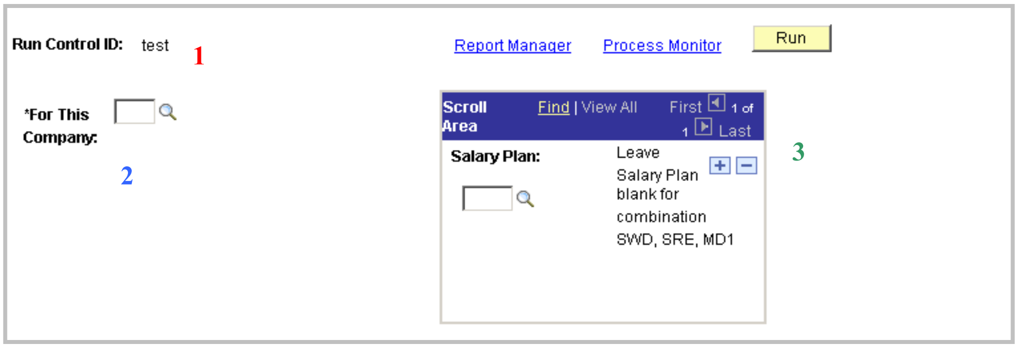
Section 2 – Aspects Common to All Seven Reports

There are three sections that function in exactly the same manner in all eight report panels: **1) the Run Control ID section**, **2) the Company section**, and **3) the Salary Plan section.**

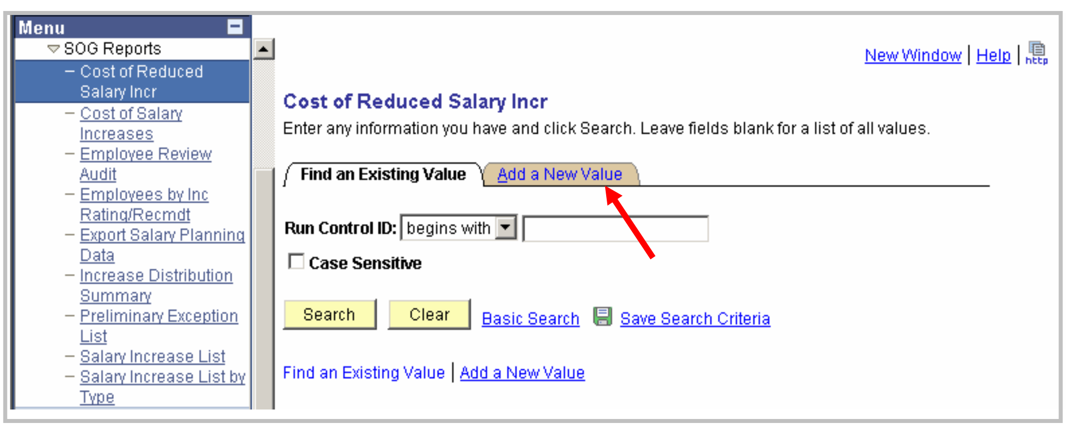


2A: User and Run Control IDs

Your User ID will automatically appear in the top left corner of all reports. This is the PeopleSoft ID you used to login.

As for the Run Control ID, you will receive a prompt window asking for this ID whenever you Update/Display a report. You will create this ID the **first** time you want to generate a report (using the "Add" feature). For all future reports, you may use the same Run Control ID. Unlike other Peoplesoft panels, changes that are made to the Salary Planning Reports panels are **not** saved to your Run Control ID. Therefore, after you have generated your first report, you can use the same Run Control ID for any reports you want to run in the future.

For your *first* report, you will navigate to the report and click on **Add A New Value** tab.



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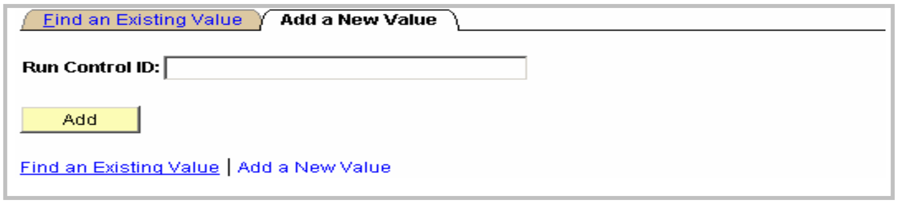
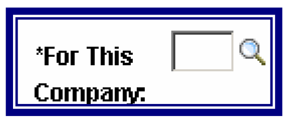
The following prompt window will appear:



Make up whatever you want your Run Control ID to be, enter it here, and click **ADD**. For example, the Run Control ID created for this training manual is "test." Notice that this same ID is used for all the reports generated. There is absolutely no advantage to using different Run Control IDs for different reports.

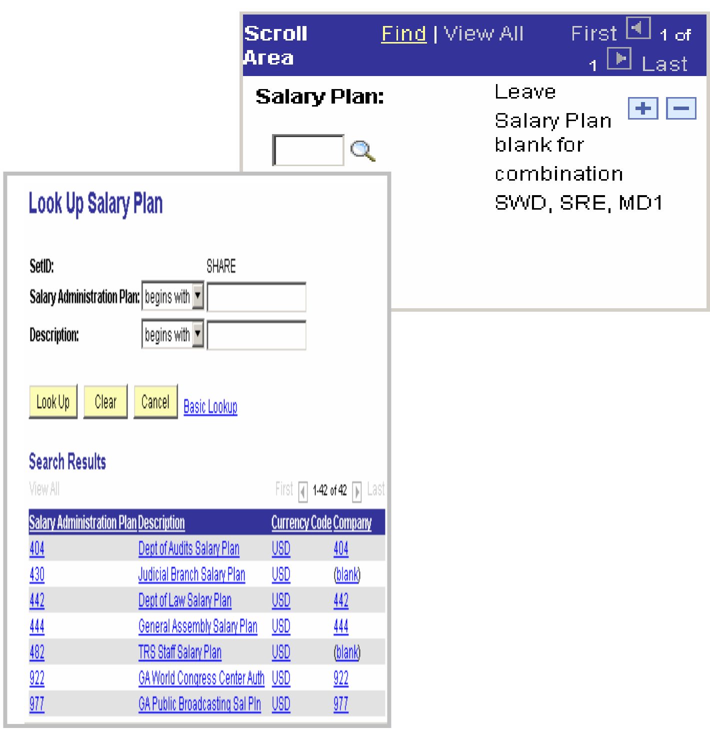
2B: Company

The first thing you need to enter for any report is the company you will be working with. In almost every situation, this will be the agency you work for. Since you will have access only to the data from your own agency, you will enter the same number in this field every time you run a report.



2C: Salary Plan

Most agencies will want to leave the Salary Plan section blank. If this section is blank, you will receive information on employees in any of three salary plans: SWD, SRE, and MD1. For most agencies, this is the information being sought. However, a few agencies have employees on different salary plans. To get information on these employees, either key-in the name of the salary plan or click on the look up button, find the salary plan, and click on it.



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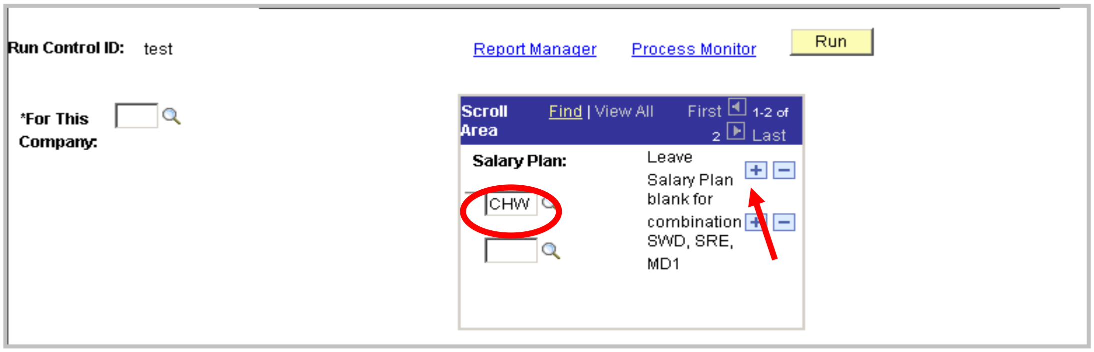
If you want information about employees in more than one ancillary salary plan (or two of the three main salary plans), enter the first plan and then click on the **Insert Row** icon.



A second **Salary Plan** box will appear. Now, enter the second salary plan. You can repeat this process to enter as many salary plans as you want. [If you make a mistake, just click the **Delete Row** icon to the right of the **Insert Row** icon.] **As an example**, if you are interested in employees in salary plans SWD and MD1 (but not SRE), you would follow these three steps: 1) Type "SWD" in the **Salary Plan** box, 2) Click the **Insert Row** icon, and 3) Type "MD1" in the second **Salary Plan** box.

Now that we have covered the three aspects that are common to all eight reports, **Sections 3-10** discuss the unique aspects of each report. Be aware that you will need to use the **Landscape** option in **Page Setup** to print any of the reports.

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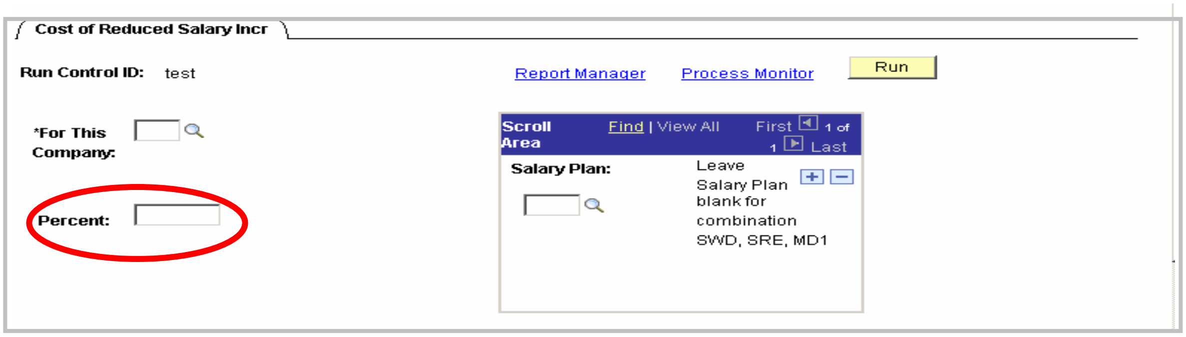
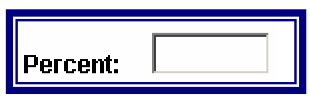
Section 3 – Cost of Reduced Salary Increase

The **Cost of Reduced Salary Increase** report[1] will be used only if your agency is considering lowering the PBI from 2%. Any time the PBI is lowered, the new percentage must be applied to the **whole** agency. The **Cost of Reduced Salary Increase** report panel looks like this:



3A: Percent

The only new section of this panel is the **Percent** section:



Here is where you will type in the lowered PBI percentage you are considering. This number must be less than 2. **As an example**, if you are considering giving the employees in the agency a 1.75% PBI, you would type "1.75" in this section and run the report.

On the **Cost of Reduced Salary Increase** report, all values refer to entire departments. This report conveys the following total costs (department sums): Old Salaries, PBIs, Total Increases, and New Salaries.

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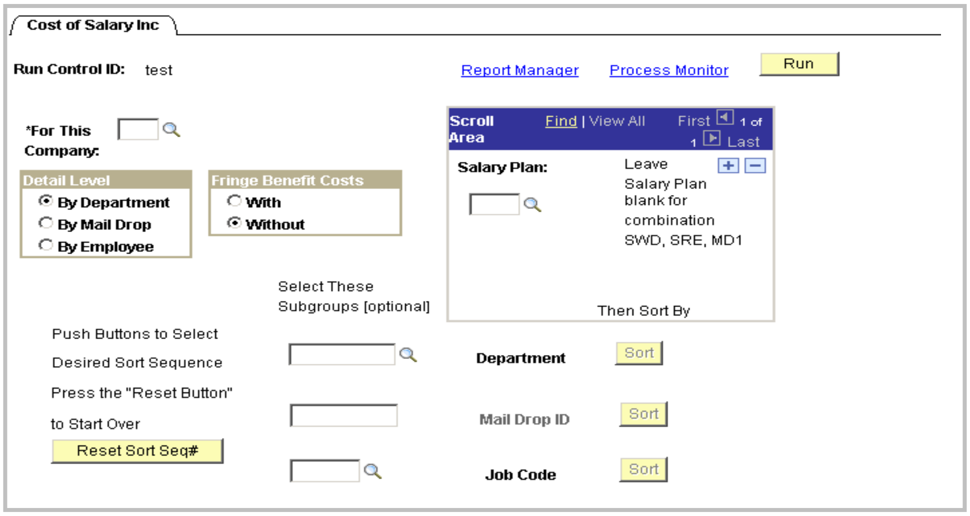
[1] Agencies requesting reduction in Performance Based Increases due to budgetary restrictions must contact the Office of Planning and Budget for consultation and approval. The deadline for contacting the Office of Planning and Budget for such a request is September 1, 2007.

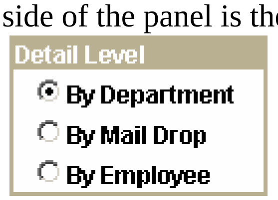
Section 4 – Cost of Salary Increases

The **Cost of Salary Increases** report uses the data that have been entered to project costs. If no data have been entered, the projected costs will equal the current salaries. The **Cost of Salary Increases** report panel looks like this:



4A: Detail Level

In the middle of the screen on the left side of the panel is the **Detail Level** section:

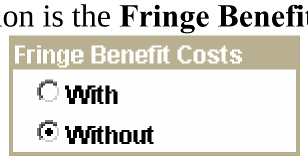


The default detail level is **By Department**. This produces a report with one overall cost for each department. The overall cost is computed by summing the individual salaries and increase amounts of the employees within the department.

The **Detail Level** can be changed to **By Mail Drop** or **By Employee**. Like the **By Department** level, **By Mail Drop** produces a report with one overall cost for each mail drop. **By Employee** gives the salaries of individual employees and a total for each department, mail drop, or job code (depending on the sort method).

4B: Fringe Benefit Costs

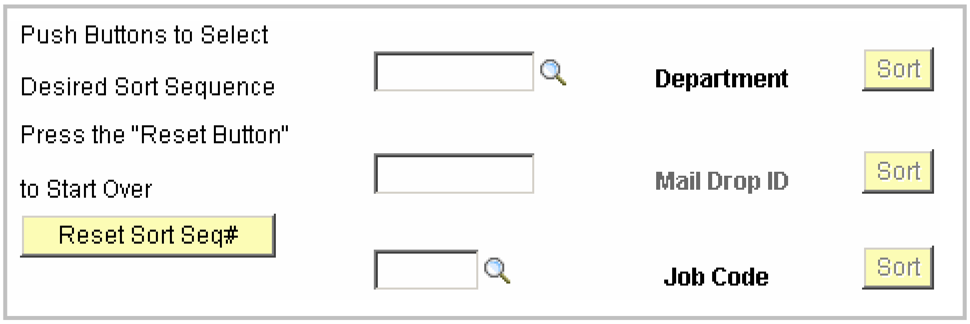
To the right of the **Detail Level** section is the **Fringe Benefit Costs** section:



The default level is **Without**. A report **Without** fringe benefit costs will convey the following summarized costs: Old Salaries, PBIs (Performance-Based Increases), Total Increases, and New Salaries. If you choose the **With** option under **Fringe Benefit Costs**, you will get a report of the following summarized costs: New Salaries, Health Costs, FICA Costs, New Plan ERS Costs, Total Fringes, and New Salaries with Total Fringes.

NOTE: When the **Detail Level** is either **By Department** or **By Mail Drop**, you may choose a report **With** or **Without Fringe Benefit Costs**. However, when the **Detail Level** is **By Employee**, the report must be **Without Fringe Benefit Costs**.

4C: Sorts and Subgroups



For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Cost of Salary Increases** report allows you to subgroup by job code. Another difference is that the sorting feature is only available when the **Detail Level** is **By Employee** (and secondary sorts are not allowed). Finally, the subgroups that are available are dependent upon which **Detail Level** you are using.

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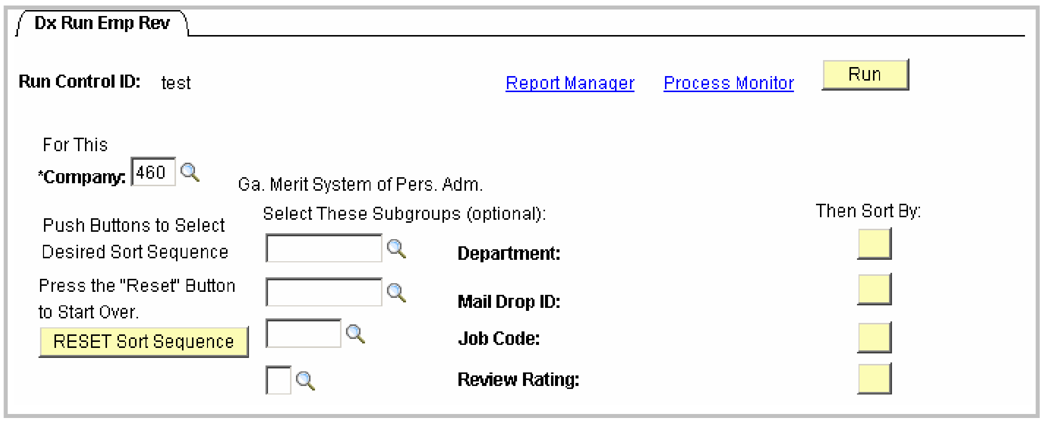
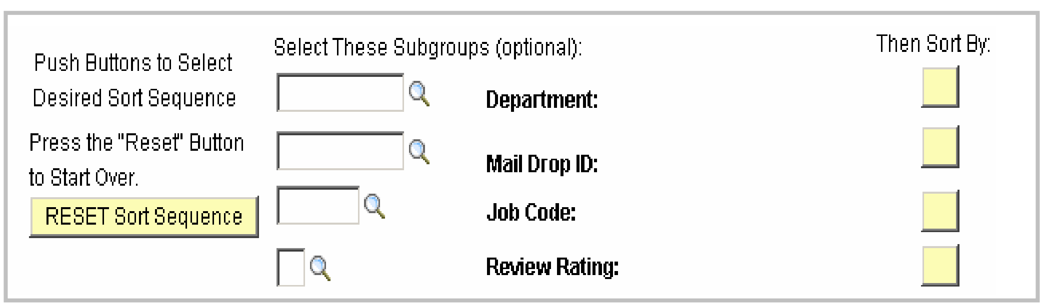
Section 5 – Employee Review Audit

The **Employee Review Audit** report allows the company to view the most current employee reviews in one report. Gives all ratings for all employees so that the company can assure that every employee got a review during the Review Period.



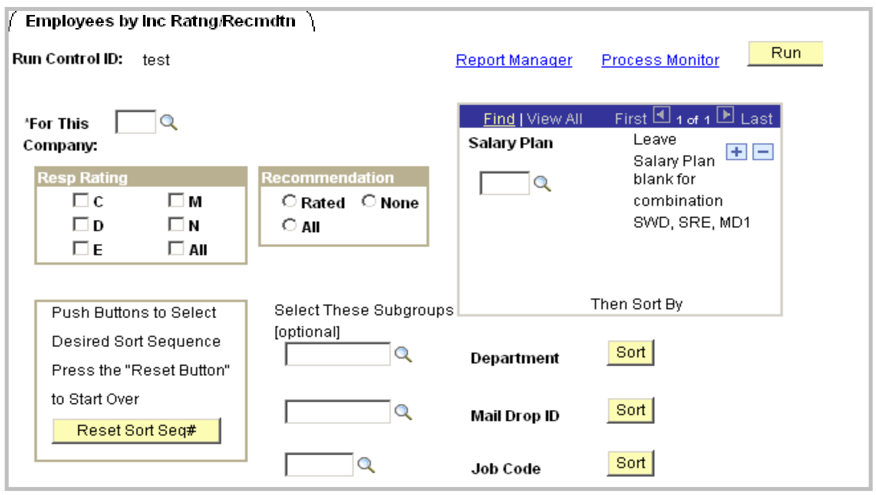
5A: Sorts and Subgroups



For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Employee Review Audit** report allows you to subgroup by job code and review rating. Another difference is that you can only sort by one variable at a time (secondary sorts are not allowed).

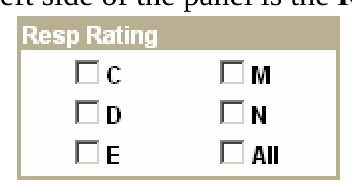
Section 6 – Employees by Increase Rating/Recommendation

The **Employees by Increase Rating/Recommendation** report produces a list of employees receiving either a certain responsibility rating or a certain recommendation. The report panel looks like this:



6A: Responsibility Rating

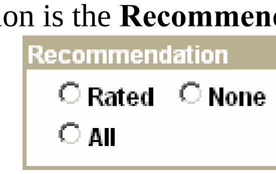
In the middle of the screen on the left side of the panel is the **Resp Rating** section:



This section allows you to tailor your report to provide information about employees who receive a specific responsibility rating. Since these are check-boxes and not radio buttons, you may choose more than one rating. However, if you choose the **All** box, every other alternative will be grayed-out (because you are already asking for all 5 ratings).

6B: Recommendation

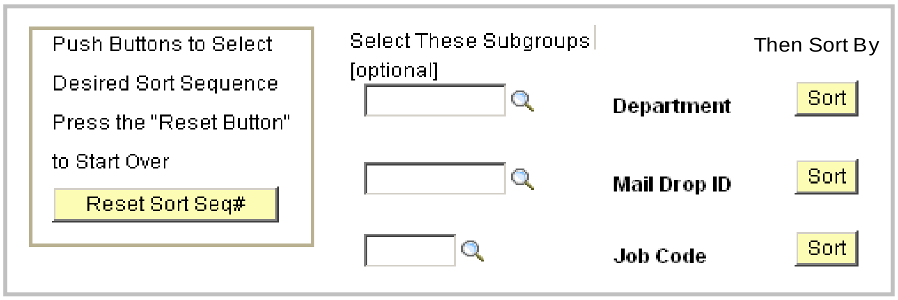
To the right of the **Resp Rating** section is the **Recommendation** section:



This section allows you to tailor your report to provide information about employees who receive a recommendation and employees who did not receive a recommendation. Unlike the responsibility ratings, these are radio buttons, so you may choose only one recommendation. However, if you want to see all employees, you may use the **All** button.

NOTE: Each report may specify *either* a responsibility rating *or* a recommendation, but not both. Once you click in one section, the other section gets grayed-out. If you change your mind and want a report using the other section, the only way to accomplish this is to click on the **refresh button** and start over.

6C: Sorts and Subgroups



For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Employees by Increase Rating/Recommendation** report allows you to subgroup by job code. Another difference is that you can only sort by one variable at a time (secondary sorts are not allowed).

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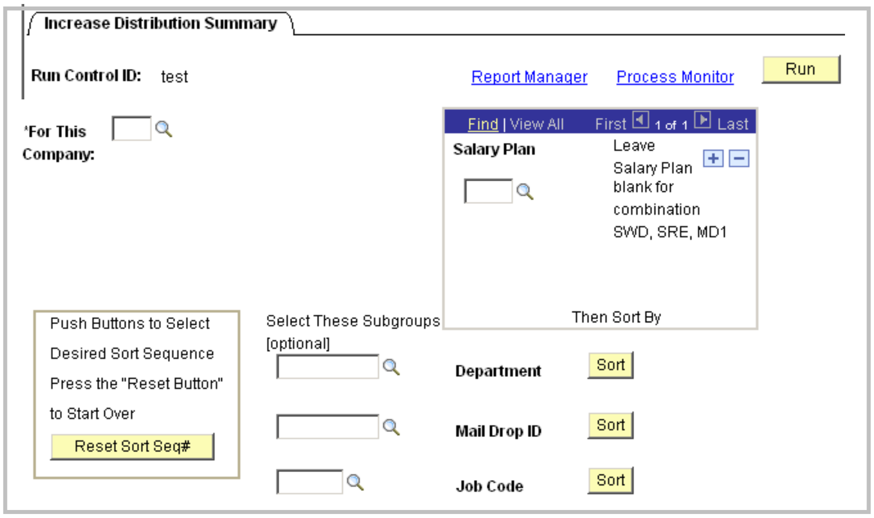
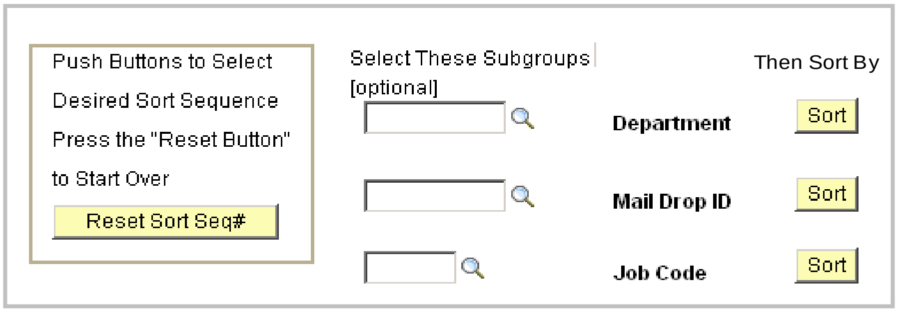
Section 7 - Increase Distribution Summary

The **Increase Distribution Summary** report produces counts and percentages of employees receiving each responsibility rating, terms and conditions rating, and recommendation. The report panel looks like this:



7A: Sorts and Subgroups

For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Increase Distribution Summary** allows you to subgroup by job code. Another difference is that you can only sort by one variable at a time (secondary sorts are not allowed).



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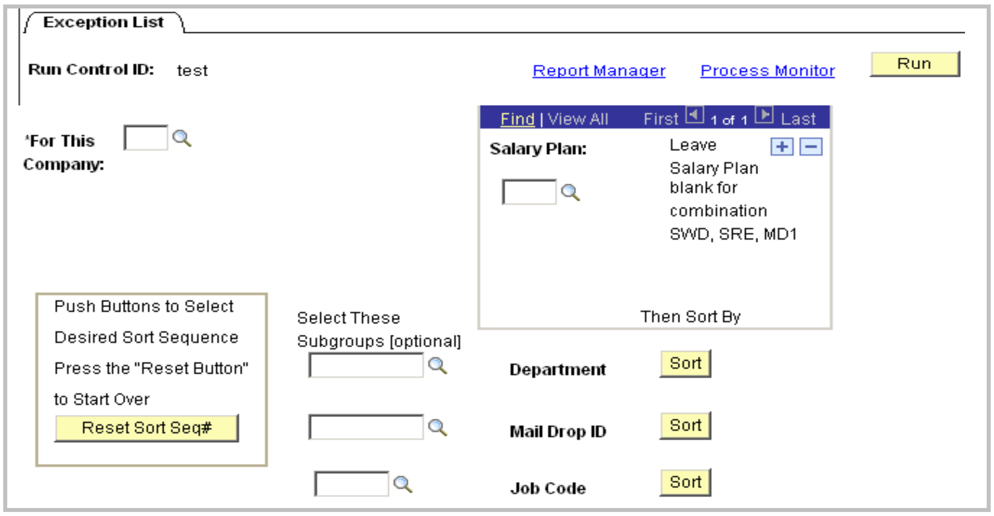
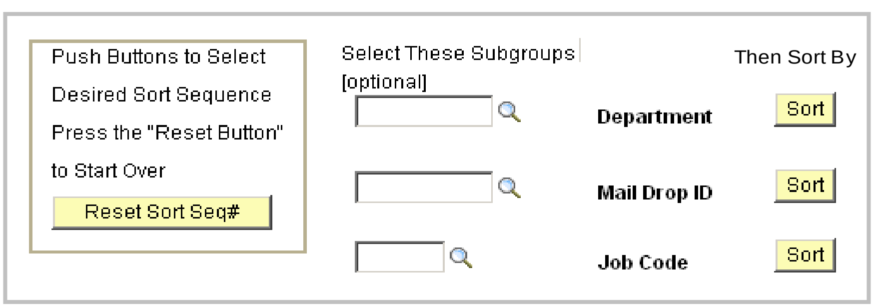
Section 8 – Preliminary Exception List

The **Preliminary Exception List** provides a record of employees who will fail to receive a PBI due to one or more of four possible errors: On Leave Without Pay, No Recommendation, Suspended, and Action Dated On or After Increase Date. The **Preliminary Exception List** panel looks like this:



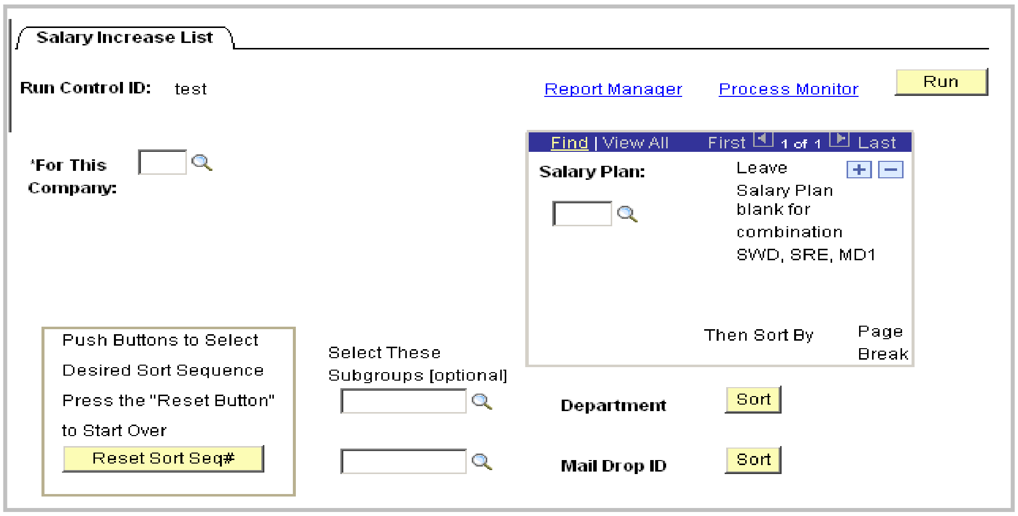
9A: Sorts and Subgroups

For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Preliminary Exception List** allows you to subgroup by job code. Another difference is that you can only sort by one variable at a time (secondary sorts are not allowed).



Section 9 – Salary Increase List

The **Salary Increase List** is a report that may be used *before* any ratings have been entered. This blank report is printed, and the ratings are recorded on the hard-copy. Then, they are entered in the **Mass Entry** screen. The **Salary Increase List** report panel looks like this:

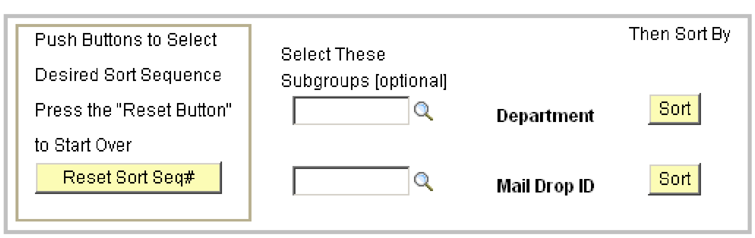


We discussed the top half of the panel in **Section 2**. Now, we will focus on the bottom half of the panel. Here is where you will specify subgroups or data sorts.
First, let's discuss sorting the data.

9A: Sorts

On the right side on the panel, you will see two **Sort** buttons under the heading **Then Sort By**. The default sort is "By Department." Therefore, if you do not click either of these buttons, your report will be sorted alphabetically within department. However, suppose that you want to sort the data by mail drop ID instead. If you click once on the **Sort** button beside **Mail Drop ID**, your report will be sorted alphabetically within mail drop.

Notice that after you click on the **Sort** button, a grayed-out box with a check in it appears under the heading **Page Break**. This just means that a page break is inserted whenever the mail drop ID changes.



One last type of sort you can perform is a secondary sort. If you click one **Sort** button and then click the other **Sort** button, the data in your report will be sorted first on the primary sort (the first button clicked) and then on the secondary sort. **For example**, if the primary sort is "By Department" and the secondary sort is "By Mail Drop ID," the data will be sorted first by department, and within each department, the data will be grouped by mail drop ID.

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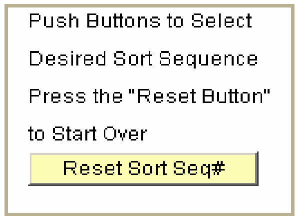
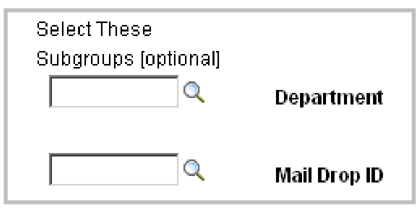
On the bottom left side of the **Salary Increase List** panel, you will see a section that appears on six of the seven report panels:



You will only need to use this section if you make a mistake with a sort. For instance, if you click on the mail drop **Sort** button and then decide that you want the data sorted by department instead, all you have to do is click on the **Reset Sort Seq#** button and start over.

9B: Subgroups

Unless you are conducting a report on the *entire* agency, you will need to specify the subgroups that you want in your report. Under the heading **Select These Subgroups [optional]**, you will see two boxes. The top box lets you select individual departments for the report, and the bottom box lets you select individual mail drop IDs (but you may pick only *one* of these two options).

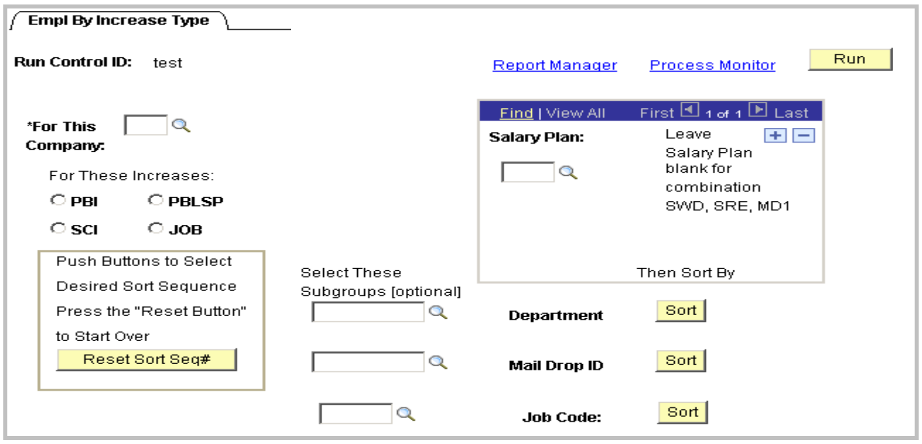


To select a department or mail drop ID, either key-in the numbers or click on the drop-down menu and choose from the list. If you want to select several departments or mail drop IDs that *all begin with the same number string*, you can use the wildcard variable (%) to do this. **As an example**, if you want a report of all departments that begin with "42710," you just type "42710%" into the **Department** box.

NOTE: If you make a mistake in this section and want to change from **Department** to **Mail Drop ID** (or vice versa), click on the **reset sort seq#** button to start over.

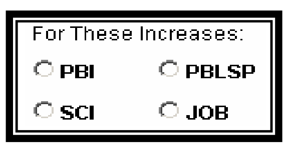
Section 10 – Salary/Employee Increase List by Type

The **Salary/Employee Increase List by Type** report produces a list of employees getting a given type of increase. The report panel looks like this:



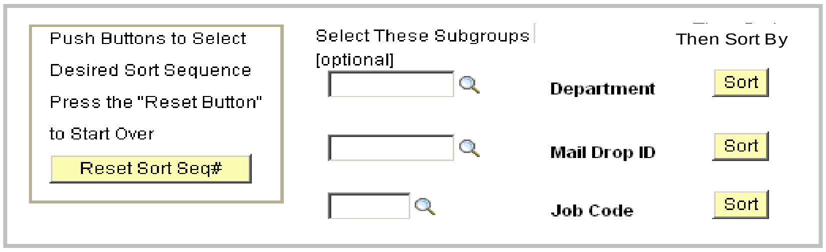
10A: Type of Increase

In the middle of the screen on the left side of the panel is the **For These Increases** section:



The only selection you can make is **PBI**. This will produce a list of all employees in the agency (or requested department, mail drop, or job code) that are receiving a PBI.

10B: Sorts and Subgroups

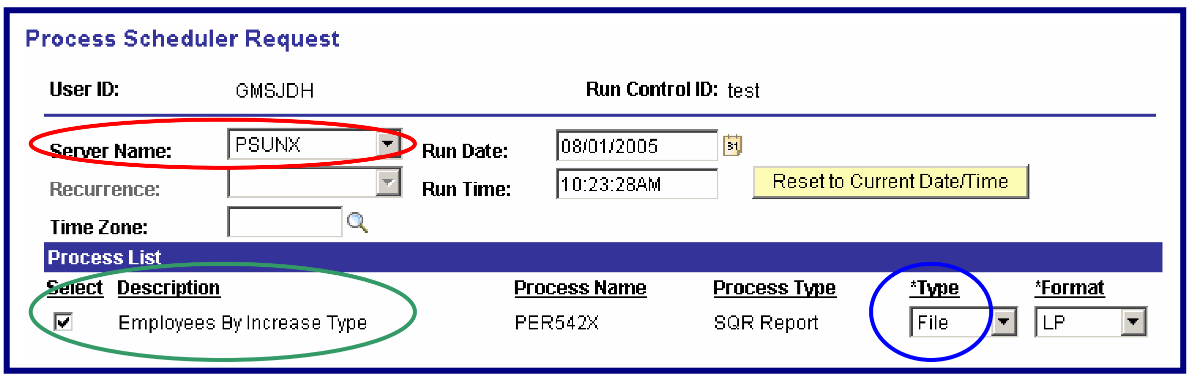


For the most part, the sorting and subgrouping features function the same way they do for the **Salary Increase List** (see sections **9A** and **9B**). However, there are a few differences. First, the **Salary/Employee by Increase Type** report allows you to subgroup by job code. Another difference is that you can only sort by one variable at a time (secondary sorts are not allowed).

Section 11 – Running a Report

To run a report, just click on the **Run** icon at the top of the screen:

Next, the **Process Scheduler Request** window will appear:



Make sure the **Server Name** is set to **PSUNX** (**Section 1**). Check the box at the bottom of the window to make sure you are running the correct report (**Section 2**). Finally, use the **Type** field to select the type of output you want to generate for this job (**Section 3**). Your choices are **File** or **Web**. **File**: Enables you to write the output to a file that will appear in the Output Destination (Document Direct).**Web**: Sends all output of the process to the report repository, including log and trace files (Local Printer).

You may want to print this screen so you can look back at it later. Once everything looks right, click **OK** and the report will run. After a little while, open the **Reports** section of **Document Direct**[2] and your report should be there.

For additional information regarding Running Reports, go the PeopleSoft UPK (User Productivity Kit) tool at https://route88upk.state.ga.us.

2 If you encounter problems accessing your reports through Document Direct, contact the PeopleSoft HCM Support Team at 404-657-3956 or 1-888-896-7771 Option 2, then 1.