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This Quick Reference Guide (QRG) outlines the One-up Compensation Manager’s process of accessing, reviewing, and submitting a Merit Planning Worksheet for completion.

* As soon as a Compensation Manager completes a Merit Planning Worksheet, it will be routed to the One-up Compensation Manager for the 1st Level Merit Review.
* The One-up Compensation Manager will receive an email stating that the worksheet is ready for review.

For additional details regarding the responsibilities of the Compensation Manager (whose worksheets One-up Compensation Managers are tasked with approving) please see the [Merit Planning for Compensation Managers](https://purdue0.sharepoint.com/sites/BPTraining/TrainingSF/SitePages/meritcompTR.aspx?_ga=2.247415238.372415092.1707745783-1551022127.1703190544) QRG.

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| Accessing the Merit Planning Worksheet for Review | |
| One-up Compensation Managers receive an email when there is a Merit Planning Worksheet available for approval. The email contains a link to access the Worksheet. The steps below are an alternative way to access the Worksheet.  [**Individuals with multiple positions**](#multiple) may encounter issues clicking the link in the email message. Please use the instructions below. | |
| Via the OneCampus portal (one.purdue.edu), select **Employee Launchpad**  Log in using **Purdue Career Account ID** and Password.. |  |
| Click the ***Plan Compensation*** To-Do tile |  |
| If you hold multiple positions and do not see the Plan Compensation tile, use the **Change Selected Employment** icon to select the appropriate position. | 1 |
| Choose the link for **1st Level Merit Review** of the target individual’s Merit Worksheet. |  |
| The Merit Planning Worksheet displays. |  |

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| Reviewing the Merit Planning Worksheet | |
| Since One-Up Compensation Managers are charged with completing worksheets as well, this section assumes that the individual reviewing the Merit Planning Worksheet has an understanding of the functions and features of the worksheet. To review the functions and features of the worksheet, please see the [Merit Planning for Compensation Managers](https://purdue0.sharepoint.com/sites/BPTraining/TrainingSF/SitePages/meritcompTR.aspx?_ga=2.247415238.372415092.1707745783-1551022127.1703190544) QRG. | |
| Review **Merit** and **Equity Increases** recommended by the Compensation Manager.  Use the **Budgets** widget to verify adherence to allocated funds.  Use the **Metrics** widget to ensure consistency between performance rating and recommended increase.  Add **Extra Merit** if appropriate / allowable by area practice. |  |
| Review **New Salary Information**. |  |
| **Review any other data as desired, ensuring compliance with budget/salary policy.** | |

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| Returning to Previous Step / Sending to Next Step | |
| If any changes have been made, click **Save**. |  |
| ***If sending to previous step (changes needed):***  Click **Send to previous step** |  |
| ***If sending to previous step (changes needed):***   1. Include a comment informing the Compensation Manager of the desired adjustments. 2. Click **Send to previous step** | **2**  **1** |
| ***If sending to next step (completion):***  Click **Send to next step** |  |
| ***If sending to next step (completion):***  The form will be submitted to the Compensation team for implementation.   1. Include a comment if needed. 2. Click **Send to next step** | **2**  **1** |

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| Form Status Information | |
| Status of Forms are always available in the ***Forms*** section. | |
| 1. From the*Home* menu, select ***Compensation*** 2. In the menu bar, click ***Forms*** | **1**  **2** |
| **Completed:** Forms have been submitted to the Compensation team and accepted (forms will not show as Completed until after the worksheet due date – all will be accepted at the same time).  **En Route:** Forms are pending approval with the individual listed in the *Currently With* column. |  |

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| Merit Planning Reports | | | |
| This section outlines the reporting and exporting functionalities available to Compensation Managers during and following the Merit Planning process. | | | |
| Export Merit Worksheet | | | |
| If you wish to **export** the worksheet to review the information, please follow the step below.  Note: Worksheets cannot be imported. | | | |
| Click the ***Summary*** tab.  Click ***Export as MS Excel***. | | |  |
| Export Detailed and Rollup Reports | | | |
| These reports provide the aggregate of total values of all users in the Compensation Manager hierarchy below the individual selected. The reports allow for drill-down to other users and review of specific Compensation worksheets. These reports cannot be edited and imported back into the Compensation module. | | | |
| 1. From the *Home* menu, select the ***Compensation*** module 2. Click the **Forms** tab 3. Select **All Forms** | | **3**  **2**  **1** | |
| In the *Action* column, click the **Detailed Report** icon  () | |  | |
| **4**  **3**  **2**  **1** | | | |
| The Team Totals report is displayed for yourself and all Compensation Managers below you (in the Compensation Manager hierarchy). Some helpful features of the report are: | | | |
| 1 | Click each Team Total link to drill into the worksheets. | | |
| 2 | Option to view the data in $ or % | | |
| 3 | Columns found on the far right of the worksheet outline the budget utilized and remaining | | |
| 4 | Option to Export to MS Excel (additional details on this process begin with the next step of this document) | | |
| To export a detailed and rollup version of this report, click Export as MS Excel | |  | |
| *If an error message is displayed stating that the report has been scheduled for batch processing, see the* [*Viewing Batch Processed Reports*](#_Viewing_Batch_Processed) *section of this document.*  *This message is typically displayed when more than 1000 records are being exported.* | |  | |
| **Save** the zipped folder. | |  | |
| Two reports will appear in the folder:   * ***Compensation Rollup - Details*** * ***Compensation Rollup - Rollup*** | |  | |
| **Compensation Rollup – Details** displays the expanded view of all worksheets listed and all individuals listed on each worksheet. | |  | |
| **Compensation Rollup – Rollup** displays the rollup of each Compensation Manager’s worksheet listed (no individual detail), with budget used, percentage, and budget remaining. | |  | |

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| Viewing Batch Processed Reports | |
| If attempting to export a large report, it may be scheduled for batch processing. This section outlines how to retrieve the report. |  |
| Use the *Home* menu to access the ***Reporting*** module. |  |
| Click ***Switch to Classic View*** |  |
| Click ***Scheduled Reports***  The report(s) are listed.  Locate the *Download column* of the line representing the desired report and click ***zipped*** to download the files. |  |