

Salary Planning

View the Salary Planning Grid

- From your **Workday homepage**, navigate to your **Workday inbox** and select the **Salary Planning** inbox item. The action item includes a Salary Planning Grid where you will enter salary allocations.

Note: Leaders with executives reporting to them will receive **two** inbox action items; both Salary Planning Grids for executives and non-executives will need to be completed.

The screenshot shows the Workday interface. At the top left is the Williams logo and a search bar. On the right, there are notification and action icons, with one icon highlighted by a red box. Below the header is a blue 'Inbox' bar. The main content area is divided into two sections. On the left, there's a list of actions, with one item highlighted by a red box: 'Salary Planning: 2018 Salary Planning for Operations Org (John Doe)' with a sub-item '1 day(s) ago – Effective 1/28/18'. On the right, the 'Organization Summary' for 'Salary Planning: 2018 West Salary Planning' is displayed. It shows a progress indicator of 0% for 'Salary Planning USD' of 544,888.34. Below this is a table with columns for Organization, Sub Orgs, View, Propose, Activity, Status, Positions, Salary Planning, and Actions. The table contains one row for 'Operations Org (John Doe)' with a status of 'Awaiting Action' and 221 positions. At the bottom, there are 'Submit' and 'Search Employees' buttons.

- Your **Overall Budget and Spend** including the percent and dollar amounts allocated will appear at the top of the action item. This will update automatically so you can track your progress against total budget as you allocate increase dollars to employees.

Overall Budget and Spend



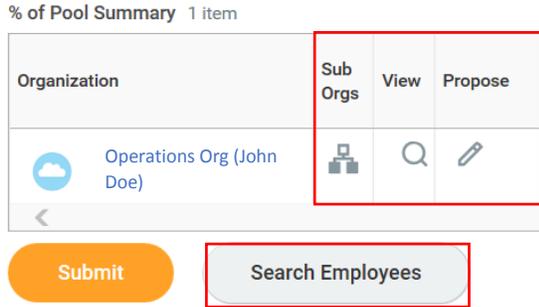
Overall Budget and Spend



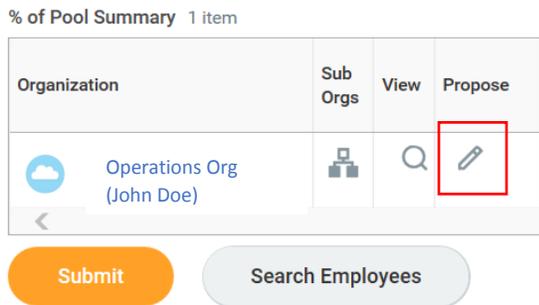
IMPORTANT: If you do not have subordinate organizations please skip to **Step 5**.

- If you have subordinate organizations, you will have the following options to view your organization or begin making allocations:
 - Sub Orgs** - Allows you to view and drill into all subordinate organizations.

- **View** or **Search Employees** - Allows you to view specific employee data and filter it in various ways.
- **Propose** - Allows you to enter salary increases for your direct reports.



4. Select the pencil icon under **Propose** to begin making allocations for your direct reports.



Navigate the Salary Planning Grid

5. Adjust gridlines by hovering between columns and dragging the column. The Salary Planning Grid can also be downloaded as an Excel document using the Excel Workbook icon.

The screenshot shows the "Salary Planning" grid. At the top right, there are several icons, including one for an Excel Workbook, which is highlighted with a red box. Below the icons, the grid has 18 items. The table columns are: ~Employee~, Job Title, Current RWRR, Previous RWRR, Current Annual Rate, New Annual Rate, Salary Planning Budget %, Salary Planning Increase %, and Salary Planning Amount. The first row of data shows an employee named "Operations Technician Lead" with a current annual rate of 88,731.99 and a salary planning increase of 0.00%.

~Employee~	Job Title	Current RWRR	Previous RWRR	Current Annual Rate	New Annual Rate	Salary Planning Budget %	Salary Planning Increase %	Salary Planning Amount
Employee Name ID # 000123	Operations Technician Lead	AA	AA	88,731.99	88,731.99	2.75%	0.00%	0.00

6. To filter data or sort by column, click on the column header and use the drop-down options to adjust.

5 items

~Employee~	Job Title	Current RWRR	Previous RWRR
 Employee Name ID # 000123	↑ Sort Ascending ↓ Sort Descending		AA
 Employee Name ID # 000456	Filter Condition * <input type="text" value="contains"/>		AAH
 Employee Name ID # 000789	Value * <input type="text"/>		AA
 Employee Name ID # 0001011	<input type="button" value="Filter"/>		AA
			AAH

7. You can view additional information for each employee by selecting the row of the employee you want to view. A **smart panel** will display important compensation and role information to help you with making salary increase recommendations.

Current / New Compa-Ratio
1.075 - 1.075

Min - Mid - Max
49,000 - 63,600 - 78,400

Incentive Target
6.00%

Last Pay Adjustment: Date-Amt
02/17/2018 - 2,655.35

Ladder Level
B4

Time in Job Profile
4 year(s), 11 month(s), 7 day(s)

Full Time Equivalent %
100

Allocate Budget Dollars

- 8. To enter salary increases, enter a dollar amount in the **Salary Planning Amount** column **OR** enter a percent increase in the **Salary Planning Budget %** column. Recommendations should be made for all your direct reports.

Note: Second level managers will review and approve allocations for indirect reports during Step 11.

~Employee~	Job Title	Current RWRR	Previous RWRR	Current Annual Rate	New Annual Rate	Salary Planning Budget %	Salary Planning Increase %	Salary Planning Amount
Employee Name ID # 000123	Operations Technician Sr	AAH	AA	77,251.85	79,569.41	3.00%	3.00%	2,317.56
Employee Name ID # 000456	Operations Technician III	AA	AAH	70,452.00	70,452.00	2.75%	0.00%	0.00

- 9. Review any warning and/or error messages that appear in the **Warnings and Errors** column.

~Employee~	Job Title	Current RWRR	Previous RWRR	Salary Planning Budget %	Salary Planning Increase %	Salary Planning Amount	Warnings and Errors
Employee Name ID # 000123	Operations Technician Lead	AA	AA	2.75%	0.00%	0.00	WARNING: Employee has a salary planning increase of \$0. Please review to ensure this is correct.
Employee Name ID # 000456	Operations Technician I			3.00%	(2.00%)	(1,040.00)	ERROR: You have entered a negative merit amount. Merit values must be positive or \$0. Please review and remove this negative merit allocation.

- **Warnings** - Warnings **will not** prevent you from submitting your recommendations. Review the message to ensure the data entered is correct before proceeding.
- **Errors** - Errors **will** prevent you from submitting your recommendations. Review the message and correct the error indicated.

Note: If you have not made any salary increase allocations yet, the **default warning message** above will display for all employees until you begin making allocations.

- 10. Once you have entered all salary recommendations, reviewed all warnings and corrected any errors, click the **Submit** button. Your budget should not exceed 100% unless you have approval by your manager to do so.

Overall Budget and Spend



8 items Salary Planning

~Employee~	Job Title	Current RWRR	Previous RWRR	Current Annual Rate	New Annual Rate	Salary Planning Budget %	Salary Planning Increase %	Salary Planning Amount	Warnings and Errors
Employee Name ID # 000123	Operations Technician Sr	AA		89,440.00	91,899.60	2.75%	2.75%	2,459.60	
Employee Name ID # 000456	Operations Technician III			70,720.00	72,841.60	3.00%	3.00%	2,121.60	

Submit

11. If you have subordinate organizations, first select **Continue** at the bottom of the screen.

~Employee~	Job Title	Current RWRR	Previous RWRR	Current Annual Rate	New Annual Rate	Salary Planning Budget %	Salary Planning Increase %	Salary Planning Amount	Warnings and Errors
Employee Name ID # 000123	Mgr Operations	AA	AAH	133,502.00	137,507.06	3.00%	<input type="text" value="3.00%"/>	<input type="text" value="4,005.06"/>	
Employee Name ID # 000456	Mgr Operations	AAH	EA	153,941.29	158,559.53	3.00%	3.00%	4,618.24	
Employee Name ID # 000789	Mgr Operations	AAH	AAH	132,221.18	136,518.37	3.25%	3.25%	4,297.19	
Employee Name ID # 0001011	Mgr Operations	AA	AA	137,360.51	141,481.33	3.00%	3.00%	4,120.82	
	Mgr Operations	AA	AAH	147,792.47	151,856.76	2.75%	2.75%	4,064.29	

Continue

12. Select **Submit** on the next page to submit for your overall organization.

IMPORTANT: If you have supervisors reporting to you, you will have to wait until their Salary Planning Grids have been submitted before you can submit your overall organization.

% of Pool Summary 1 item

Organization	Sub Orgs	View	Propose
Operations Org (John Doe)			

Submit

Search Employees

Complete on Behalf (managers with subordinate organizations only)

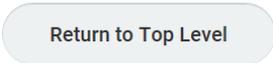
If there are supervisors reporting to you that are not available during the Salary Planning Process, you can enter salary increase recommendations for their organization via the **Complete on Behalf** functionality.

1. Select **Sub Orgs** on the main screen of your inbox action item.

% of Pool Summary 1 item

Organization	Sub Orgs	View	Propose
Operations Org (John Doe)			

Note: If at any time you need to go back to the top level organization you can select the back button in your browser or select **Return to Top Level** at the bottom of the screen.



2. Select the **Actions** drop-down from the Actions Column of the subordinate organization you would like to allocate or edit salary increase allocations for.

Organization	Sub Orgs	View	Activity	Status	Position:	Errors	Salary Planning	Actions
Operations Org (John Doe)				Awaiting Action	5		0.00%	Actions
Operations Org -2 (James Smith)				Awaiting Action	9		0.00%	Actions

3. Select **Complete on Behalf** from the drop-down menu.

Organization	Sub Orgs	View	Activity	Status	Position:	Errors	Salary Planning	Actions
Operations Org (John Doe)				Awaiting Action	5		0.00%	Actions
Operations Org -2 (James Smith)				Awaiting Action	9		0.00%	Actions View All Employees Search Employees Complete on Behalf
Operations Org -3 (Jane Doe)				Awaiting Action	7		0.00%	

- Review the **Important Information** message, then select the check box next to **Confirm** and provide a brief description in the **Comment** section. Select **Complete on Behalf**.

1 item

Organization	Planner	Status	Employees
Operations Org -2 (James Smith)	James Smith	Awaiting Action	9

Important Information I understand this action will bring award planning up to my level so I may edit. All planners in subordinate organizations will be locked out as a consequence. After this action, I can only send back to the planner(s) directly below my organization.

Confirm

Comment

Complete on Behalf Cancel

- Select **Done** on the next screen.
- A **pencil icon** will now display instead of a magnifying glass in the **View** column. **Manually Advanced** will also display in the **Status** column. These indicate that you can now make edits to that subordinate organization’s Salary Planning Grid.

Organization	Sub Orgs	View	Activity	Status	Positions	Errors	Salary Planning	Actions
Operations Org (John Doe)				Awaiting Action	5		0.00%	Actions
Operations Org -2 (James Smith)				Manually Advanced	9	9	0.00%	Actions

- To begin making allocations select the **pencil icon** under the view column.
- Once you have made all recommendations, you can either **Submit** the Salary Planning Grid with your overall organization OR **Send Back** to the supervisor for review and/or additional edits.

IMPORTANT: You may choose to **Submit** with your overall organization rather than sending back if a supervisor is absent during the salary planning process period. Before submitting for your overall organization at the top level, you will need to wait until all of your subordinate organizations have submitted their Salary Planning Grids.

- If you need to send back to the supervisor for review, select **Actions** and then select **Send Back** from the drop-down.

Organization	Sub Orgs	View	Activity	Status	Positions	Errors	Salary Planning	Actions
Operations Org (John Doe)				Awaiting Action	5		0.00%	Actions
Operations Org -2 (James Smith)				Manually Advanced	9	7	23.61%	Actions
Operations Org -3 (Jane Doe)				Awaiting Action	7		0.00%	Actions

View All Employees

View Employees with Errors

Search Employees

Send Back

- Provide a brief description in the **Comment** section and select **Send Back**.

1 item

Organization	Planner	Status	Employees
Operations Org -2 (James Smith)	James Smith	Manually Advanced	9

Comment * Write comment

Send Back

Cancel

- Select **Done** on the next screen.

- A **magnifying glass** will now display instead of a pencil icon in the **View** column and **Sent Back** will display in the **Status** column. These indicate that edits to the Salary Planning Grid can now be made by the supervisor of that subordinate organization.

Organization	Sub Orgs	View	Activity	Status	Positions	Errors	Salary Planning	Actions
Operations Org (John Doe)				Awaiting Action	5		0.00%	Actions
Operations Org -2 (James Smith)				Sent Back	9	7	23.61%	Actions