MERCER

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MERCER WIN® | Core
QUICK REFERENCE GUIDE

MARSH & McLENNAN COMPANIES

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Logging Into WIN

Open your internet browser* and enter: **http://imercer.com/win** in the address bar. Once the iMercer WIN window opens, complete the following steps:

1. Click the **Mercer WIN®** link, located in the My Account section of the iMercer page.

2. On the Mercer WIN Welcome page**, enter your email address in the **Email** field.

3. Enter your password in the **Password** field. The alphanumeric text will not display on the screen. Instead, an asterisk will represent each character.

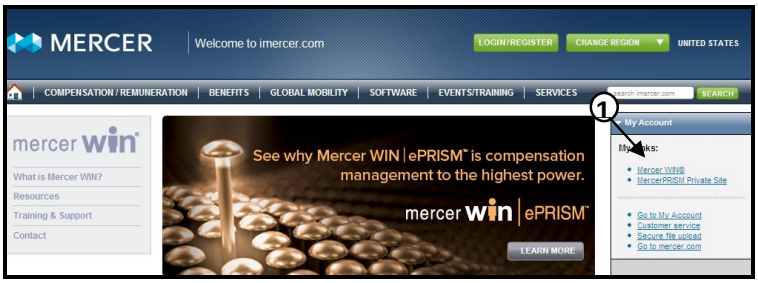
*Note: If you can't remember your password, click the **Forgot Password?** link and follow the instructions to receive a new password..*

4. Once you have entered your data in the fields, click the **Sign In** button. The WIN Home Page will display.***

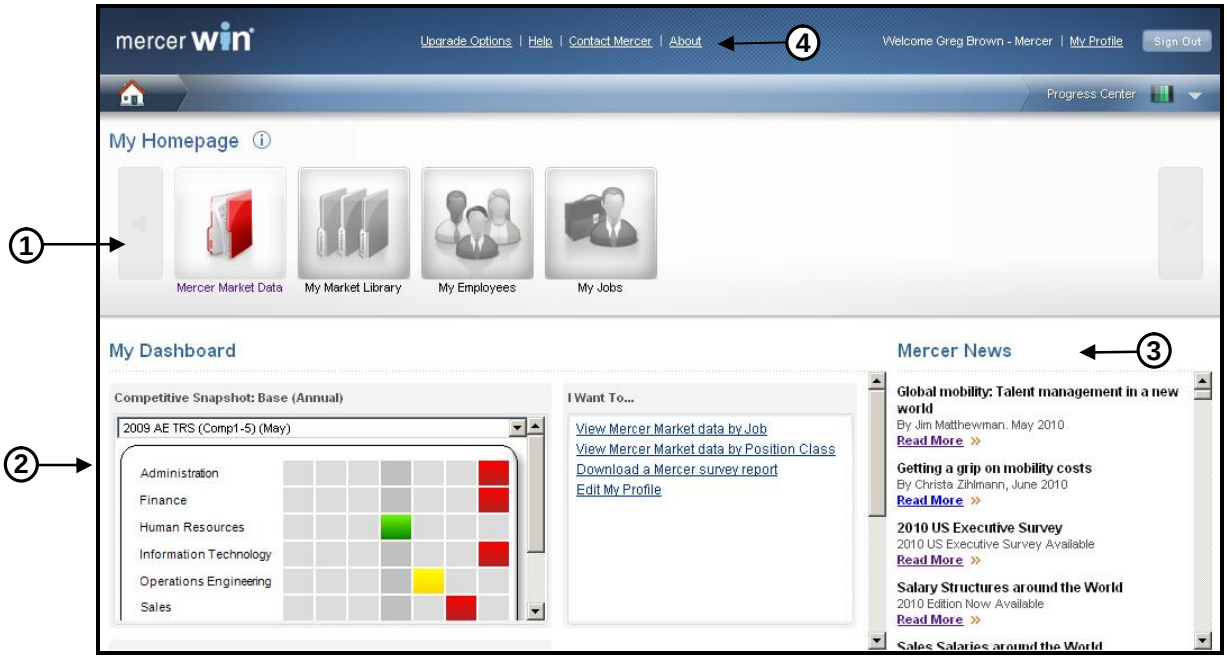
**WIN currently supports Windows Internet Explorer 8+, Mozilla Firefox 3.6+, and Safari for Windows 5.0.*

***If you are already logged into iMercer.com, you will go directly to the WIN Homepage.*

****If you are signing in for the first time, a popup may prompt you to accept the licensing agreement for the market views your organization has purchased.*



The Mercer WIN Homepage



1	**Module Navigation** – Click a button on this scrollable ribbon to access available WIN modules.
2	**Dashboard** – Contains a number of mini-applications that are specific to your organization in a graphical, easy to understand format.
3	**Mercer News** – Displays the latest Mercer articles and news items.
4	**Header Links** – The following links display in the WIN header and are accessible on every page in the Mercer WIN environment: ▪ **Upgrade Options –** allows you to preview features available through Mercer WIN | Advanced and provides links to purchase an upgrade of your organization's WIN account or to participate in a free trial of Mercer WIN | Advanced. ▪ **Help –** accesses the WIN Online Help System. ▪ **Contact Mercer –** initiates an email to Mercer. ▪ **About –** provides information on licensing agreements and the current version of WIN. ▪ **My Profile –** links to your User Profile page. ▪ **Sign Out –** logs the user out of WIN.

Dashboards

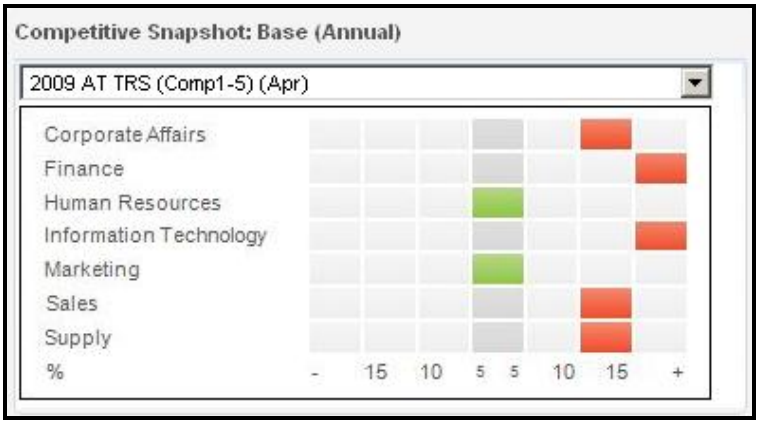
A dashboard is a user interface that hosts a number of mini-applications known as widgets. The WIN Dashboard typically contains data that is specific to your organization in a graphical, easy to understand format, as well as links to pre-configured tasks.

The following widgets are currently available on the WIN home page:

Competitive Snapshot

The Competitive Snapshot widget compares your organization's market data (mean annual base) with market data collected by Mercer from other organizations, by Job family. A drop-down list at the top of the widget allows you to select from market views that your organization has purchased and participated in.

Each column on the grid represents a percentage range, and the colored cells alert you to how your organization's Job family compares to the market median. (Ex. Green represents a ratio greater than -5% and less than 5%)



My Market Views

The My Market Views widget allows users quick and easy access to Mercer Market Views, including market view details and published reports. To go to a market view, click directly on the market view name listed in the Market View column. The link will redirect you to the Market View Detail page.

I Want To…

The **I Want To...** widget displays links to common tasks performed in the WIN system. Each task link will redirect you to another pre-configured page in the WIN system.

View Mercer Market data by Job – takes you to the Search page with setting pre-configured to search by Job.

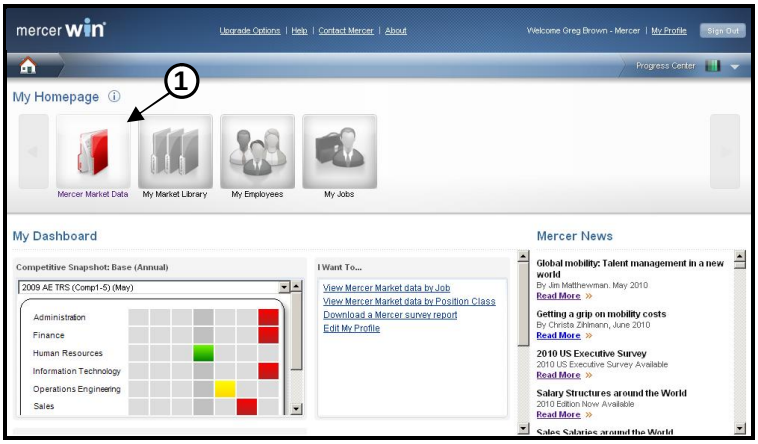
View Mercer Market data by Position Class – takes you to the Search page with setting pre-configured to search by Position Class.

Download a Mercer survey report – allows you to download published reports from market views.

Edit My Profile – redirects you to the User Profile page.

Searching Mercer Market Data

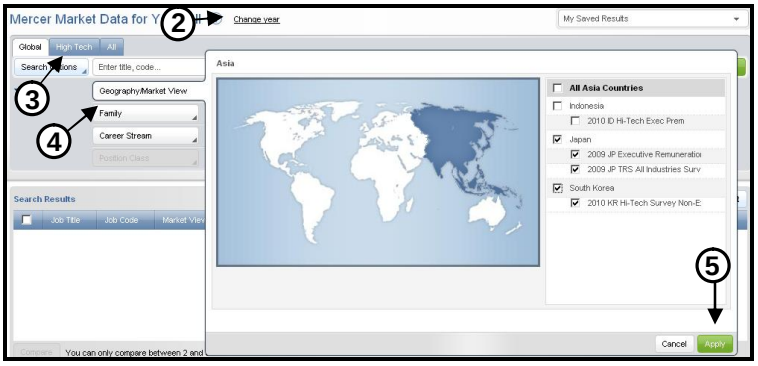
1. On the WIN homepage, click the **Mercer Market Data** button.



2. The Mercer Market Data Search page allows you to filter the market views that you conduct your job search on by year. The system automatically remembers the year setting for your last job search. To filter your market views by a different year, click the **Change year** link and select a year from the drop-down list.

3. Above the Search Options section, one or more tabs will display depending on the market views you have purchased. Select the tab that represents the type of market view data you want to search.
   - **Global** – searches job and position class data that uses the Mercer Universal Position Coding System (MUPCS).
   - **High Tech** – searches regional job data that uses the APITT coding system.
   - **All** – searches local coded (non-MUPCS) job and position class data. The All tab will display when you have purchased at least one market view.

   Note: The Global and High Tech tabs will only appear if you have purchased market views with global and high tech data..



4. The Search Options section provides you with five search options:
   - **Keyword** – searches matching job titles and job codes.
   - **Geography/Market View** – select market views by region and country.
   - **Family** – searches job families and sub-families
   - **Career Stream** – searches career streams (Executive, Management, etc) and career levels.
   - **Position Class** – searches position classes within a specific range.

   Click a button and select the filter options for that metric.

   Note: The Position Class search option is only clickable when using a Position Class view.

5. Click **Apply**. Your selections will display next to the button.

   Note: Each metric contains different filter options. For more information on individual metrics, refer to Configuring a Job Search in the WIN Online Help.

6. You can further modify your search by entering a keyword, such as job title, in the search field.

7. Select the **Limit to my jobs** checkbox to filter the result set so that only jobs which include your organization's participation data are returned.

8. Select a view by clicking the button next to the **View:** drop-down list and clicking on a view, or modify the current view by clicking the **Edit** button (see **Adding a Custom View** for details).

9. Click **Search.** The results of the search will be displayed in grid format at the bottom of the page.

Adding and Modifying Views

The WIN system provides a set of pre-configured views that contain data grouped by logical categories. (Job, Position Class, Career Stream, etc). System views cannot be changed, but custom views can be created using the system views as templates. Custom views can be edited and also serve as templates for additional views.

1. Click the **View** drop-down list and select the View you want to edit.

2. Click the **Edit** button.

3. Select the **Mercer Market Data** option. The middle pane will display all of the available data columns.

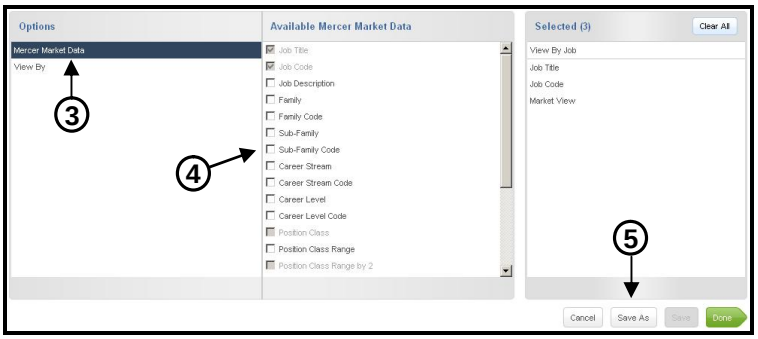
4. Click the checkbox next to each column you want to add to your View. If you want to remove a column from your View, deselect the checkbox next to it.

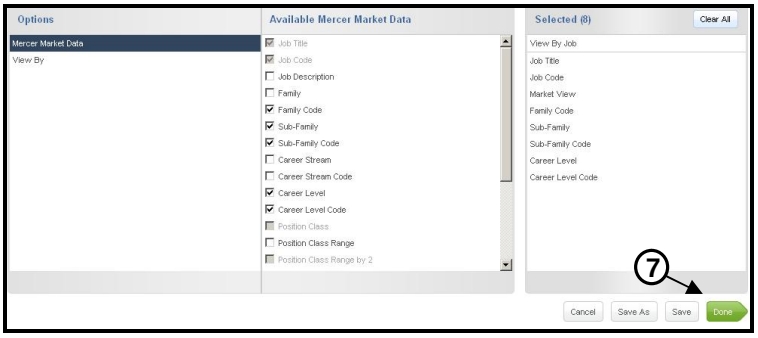
Note: Checkboxes for columns that are pre-configured for the selected template, as well as columns that cannot be used for the selected template will be grayed out.

5. Once you have made all your selections, click the **Save As** button.

6. A popup will prompt you to save your custom view. Enter a descriptive name for your view in the textbox and click **Save**.

7. Click **Done**.





Viewing Job Details

1. After searching the Mercer Market Data, click directly on a job title to view the job details. The Job Detail page will display a job description and other information about the selected job.

2. Click **Close** to close the Job Detail page and return to the Mercer Market Data page.

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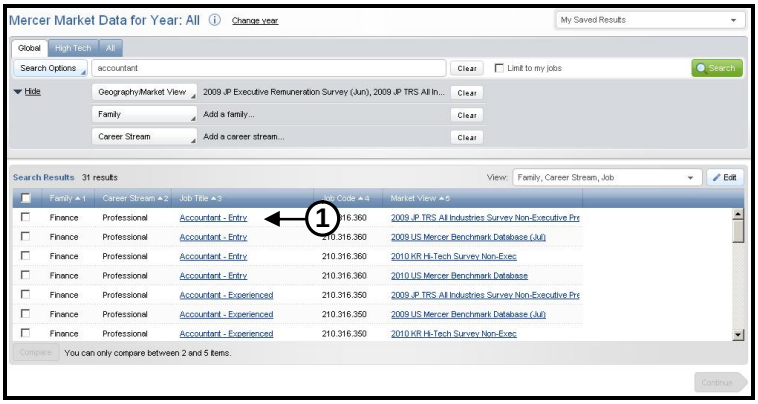
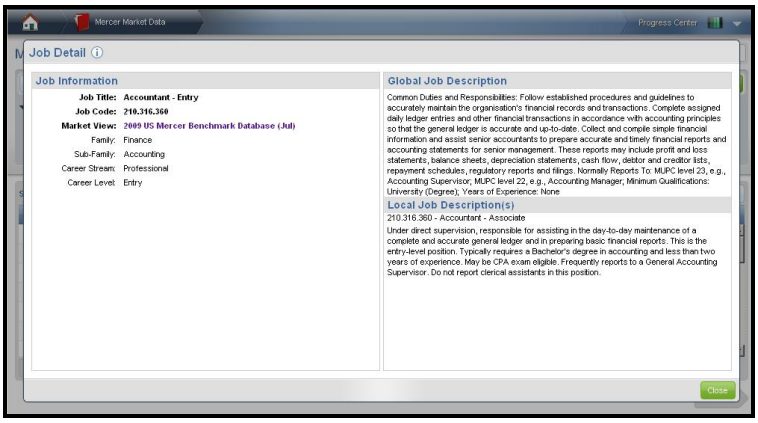




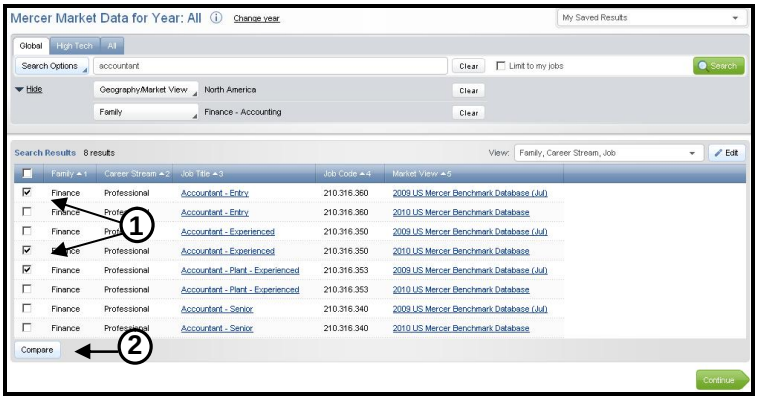
Comparing Jobs

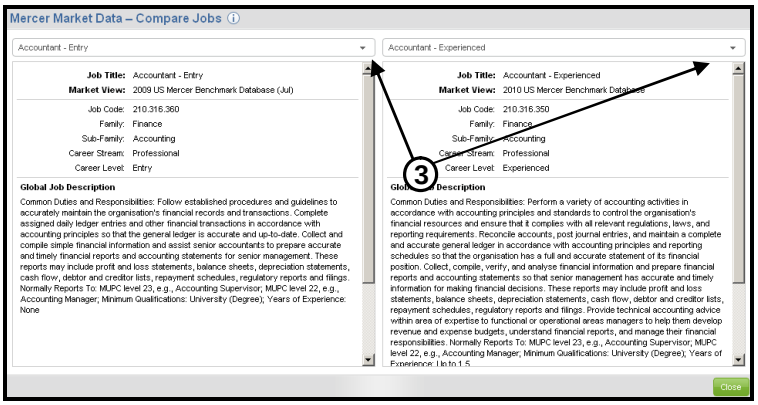
1. After searching the Mercer Market Data, click the checkbox next to each job you want to compare. You can compare up to 5 different jobs.

2. Click **Compare**.

3. The Compare Jobs page displays two jobs side-by-side. To compare any other jobs you selected from the search list, click the button at the top of either comparison window and select a job from the drop-down list.

4. Click **Close** to close the Compare Jobs page and return to the Mercer Market Data page.





The Mercer Market Data Results Page

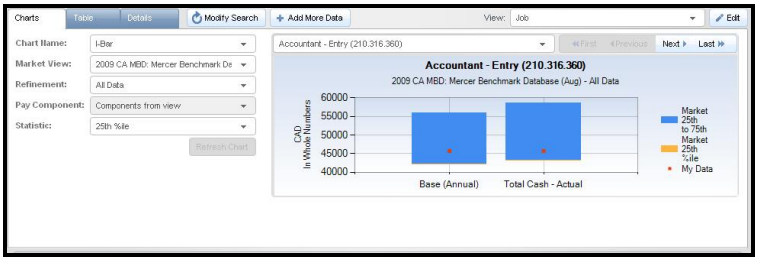
1	**Display tabs** – Click a tab to display market data in the listed format.
2	**My Saved Results** – Click here to load a previously saved results set.
3	**Print and Export icons** – Click these icons to create print-ready reports or export your data.
4	**Progress Center –** Click here to access print and export jobs
5	**Modify Search** – Click here to create a new results set.
6	**Add More Data –** Click here to add additional data to your current results set.
7	**View –** Click the drop-down list to select a view and the Edit button to create and modify views
8	**Refine Market –** Click here to filter the market environment of your results set.
9	**Combine Jobs –** Click here to combine two or more jobs.
10	**Combine PCs –** Click here to combine a range of position classes. (Only available in PC views)
11	**Compare My Data –** Click here to edit the Compare My Data feature.
12	**Normalize Data –** Click here to normalize your data to a single currency and format.
13	**Age Data –** Click here to define aging rates as well as "adjust-to" dates.
14	**Save –** Click here to save the results set.

Mercer Market Data Results Page Display Options

WIN allows you to view data on the Results page in three types of format: Charts, Tables, and Details. To navigate between formats, click the labeled tabs. The default tab for the Results page is the Charts tab for first-time users; thereafter, the Results page will default to the last tab the user was on.

Charts

The Chart tab is divided into two panes. The left pane contains controls for chart type, market view, refinement type, etc. The right pane contains the chart itself, as well as controls for changing the Unit of Analysis (job, position class, etc) being displayed and controls for navigating between items in the result set.

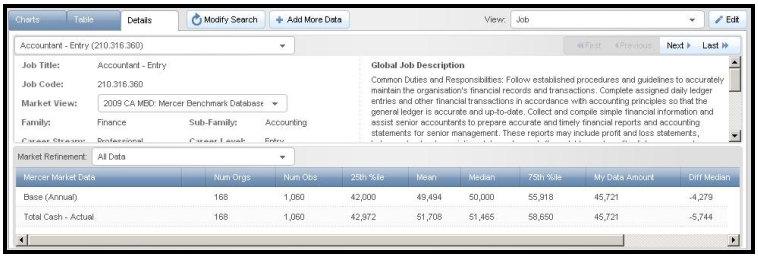


Table

The Table tab displays market data in simple table (grid) format. Information displayed on the table is dependent on the selected view and market refinements.

Details

The Details tab displays information on the current job selected from the Unit of Analysis drop-down list. (Job or Position Class listing) This display option is divided into three sections: the left pane displays general job information, the right pane displays job descriptions, and the bottom pane displays market data information.



Note: The Charts and Details tabs are not available in Bulk mode.

Editing the Compare My Data Settings

The Compare My Data popup allows you to set parameters for "Compare My Data" analysis. You can select your point of comparison to market and the type of results you wish to view (percent or amount to market) and save defaults. You can also select the type of data to display (organizational average or incumbent-level) and apply market refinement filters to your data.

To edit the current Compare My Data settings, complete the following steps:

1. On the Mercer Market Data Results page, click the **Compare My Data** button.

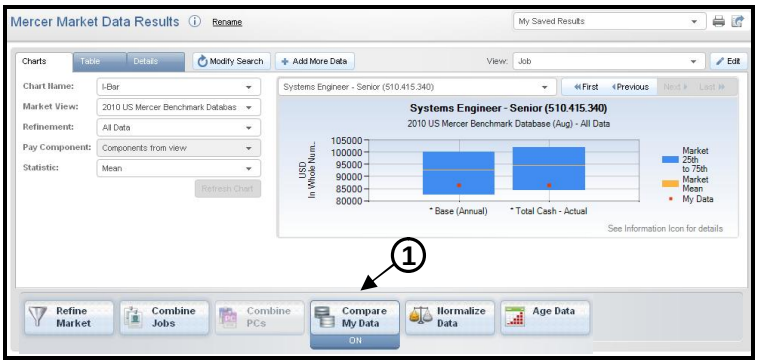
2. On the Compare My Data popup, select or deselect your data comparison options using the checkbox next to each item. In the case of **Statistic to Compare**, use the drop-down list to make your selection.

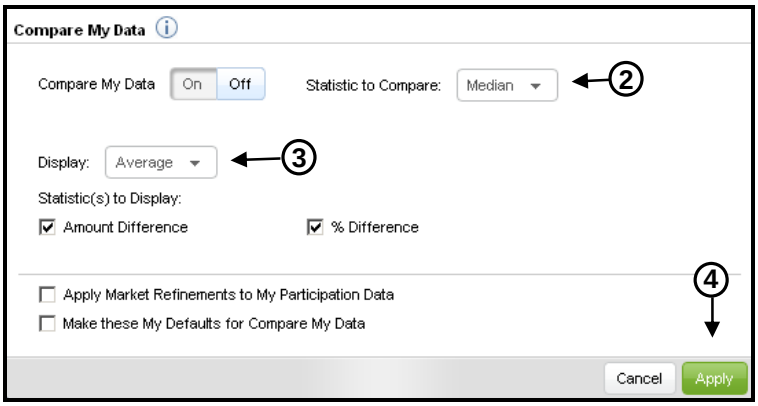
3. Use the **Display** drop-down to select organizational average or incumbent-level data to compare. Selecting "Average" will set My Data to the system generated average of your organizational data. Selecting "Individual Employees" will set My Data to display incumbent-level data.

4. Click the **Apply** button to apply your settings to the current analysis.

   *Note: Use the **On/Off** toggle to enable/disable the Compare My Data feature.*

For more information on Compare My Data settings, refer to Compare My Data section in the WIN Online Help.

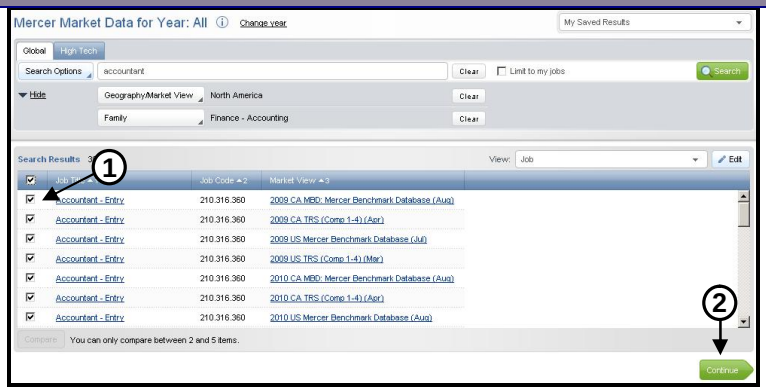


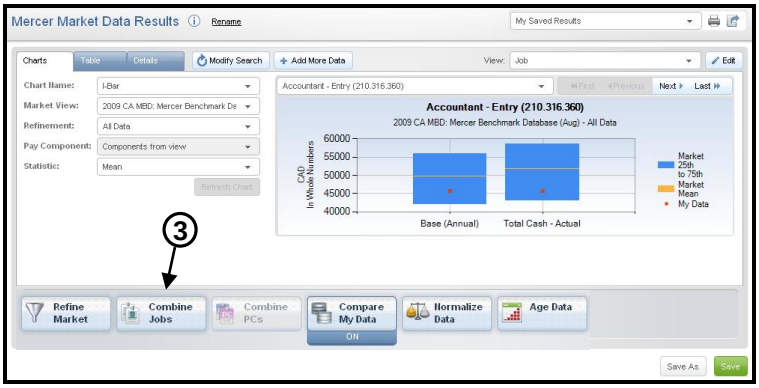


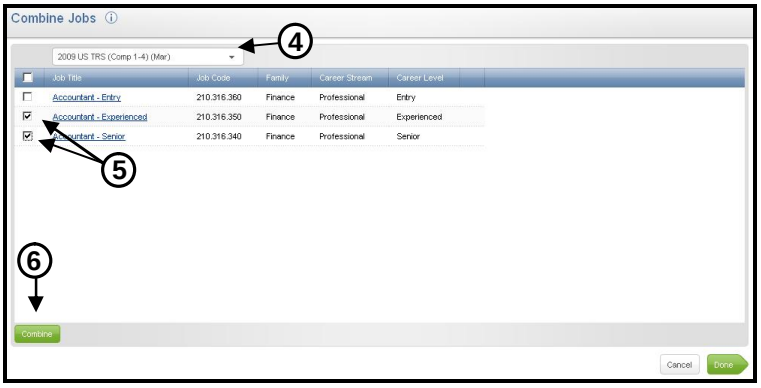
Combining Jobs

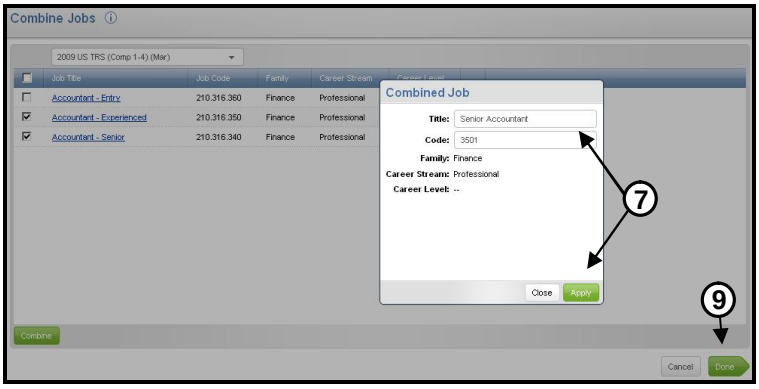
1. After searching the Mercer Market Data, click the checkbox next to each job you want to review.
2. Click **Continue**.
3. On the Data Results page, click the **Combine Jobs** button.
4. Select the market view you want to work with from the drop-down list.
5. Click the checkboxes next to the jobs that you want to combine.
6. Click **Combine**.
7. A popup will prompt you to enter a job title and a code* for the combined job. Enter the information and click **Apply** to add this job to your system.
8. The combined job will now appear in the job list, replacing the jobs used to create it. Repeat steps 4-7 for each combined job you want to create.
9. Click **Done** to return to the Mercer Market Data Results page.

**The Job Code should be a unique alphanumeric value.*









Combining PCs

The Combine PCs option is available when a position class view ("Position Class," "Position Class by 2") or a view containing position class ("Family, Position Class," "Job, Position Class") has been selected. This option allows you to combine a *range* of position classes.

1. On the Data Results page, click the **Combine PCs** button.

2. Select the market view you want to work with from the drop-down list. By default, this option is set to combine PCs from "All" market views in the results set.

3. If you select a single market view and the view is set to something other than "Position Class" (ex. "Family, Position Class"), a second drop-down will display. This option allows you to group the combined PCs according to the type of view selected (such as job, family, career stream, etc.) By default, this option is set to "All".

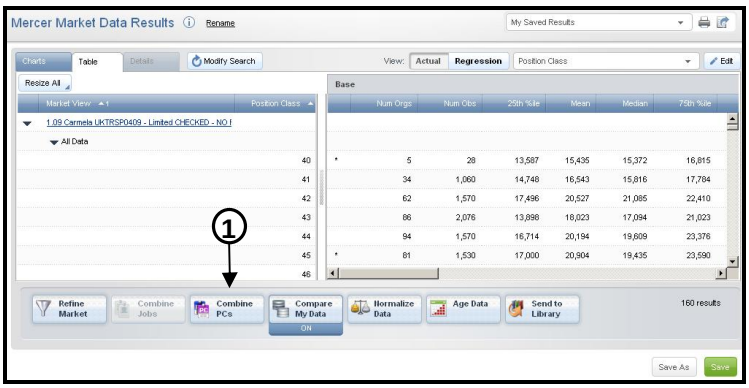
4. Click the checkboxes next to the first position class and last position class in the range you want to combine. The checkboxes for the position classes between the upper and lower limits of the range automatically be selected.

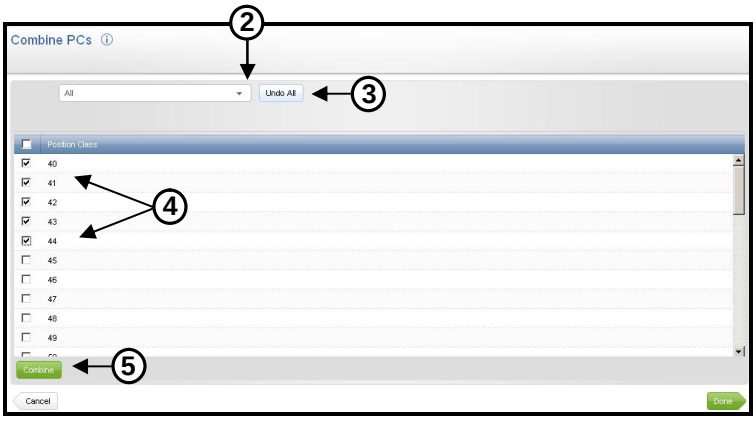
5. Click **Combine**.

6. A popup will display the selected PC range. Click **Apply** to add this combined range to your system.

7. The combined PC range will now appear in the position class list, replacing the position classes used to create it. Repeat steps 4-8 for each combined PC range you want to create.

8. Click **Done** to return to the Mercer Market Data Results page.





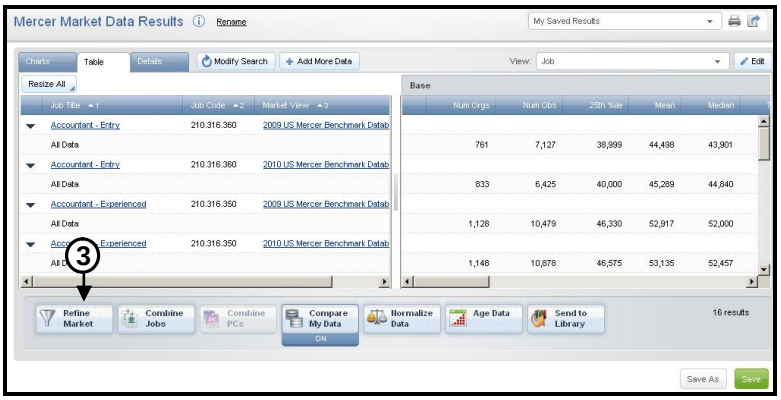
Refining and Saving a Results Set

The WIN system allows you to narrow job market data so that you may, in essence, create a "snapshot" of the market environment. This allows you to more accurately price a job based on your unique market conditions. For more information on refining a results set, consult the Refine Markets section of WIN Online Help.

1. After searching the Mercer Market Data, click the checkbox next to the job(s) you want to refine on the results grid.

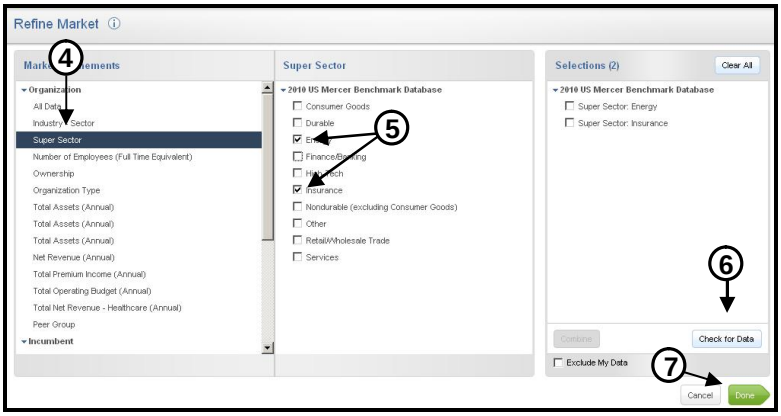
2. Click **Continue**.

3. Click the **Refine Market** button. This option allows you to narrow the market environment so that it reflects the environment in which the job you want to benchmark exists.



4. Select a category from the Market Refinements list.

5. Select a market view and choose market refinement options from the middle column. Your refinements will display in the My Market Refinement Selections column. This column also allows you to combine refinements within the same market view, as well as providing you with the option of excluding your organization's participation data from the market refinements.



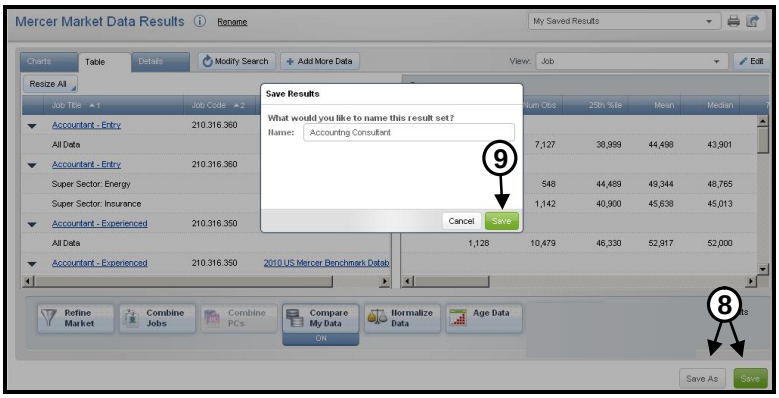
6. Click the **Check for Data** button. This tool allows you to validate whether the selected market refinements will yield results. An icon will appear next to each refinement which offers an indication of the amount of data the refinement will yield for the selected market view.

For more information on Check for Data, refer to the Check for Data section in the WIN Online Help.

7. Click **Done**.

8. The job will now list all the Market Refinements that you have selected. Click the **Save** or **Save As** buttons to save this job for future reference.

9. The Save Results popup will prompt you to name the result set. Enter a unique name for your analysis in the text field and click the **Save** button.



Your market snapshot will now appear in the **My Saved Results** drop-down list.

Normalizing Data

WIN's normalize data option allows you to set market data results to a single currency type and scaling format. For more information on the data normalization process, consult the Normalizing Data section of WIN Online Help.

1. On the Data Results page, click the **Normalize Data** button.

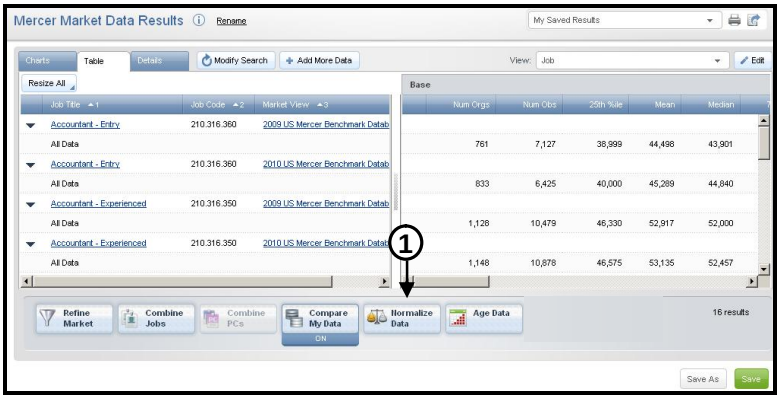
2. The Normalize Data popup will display. By default, scaling is set to "In Whole Numbers". To change scaling, click the **On** button next to **Data Scaling:** and select a scaling option from the drop-down list.

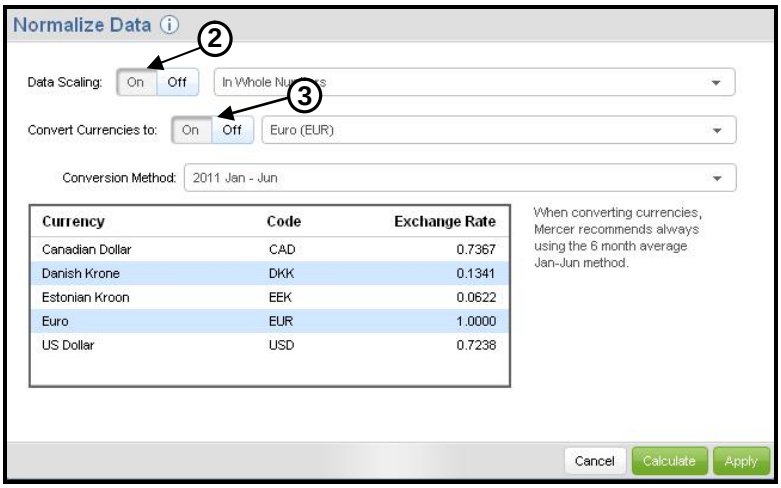
3. To apply currency conversion, click the **On** button next to **Convert Currencies to:** and select a currency from the drop-down list.

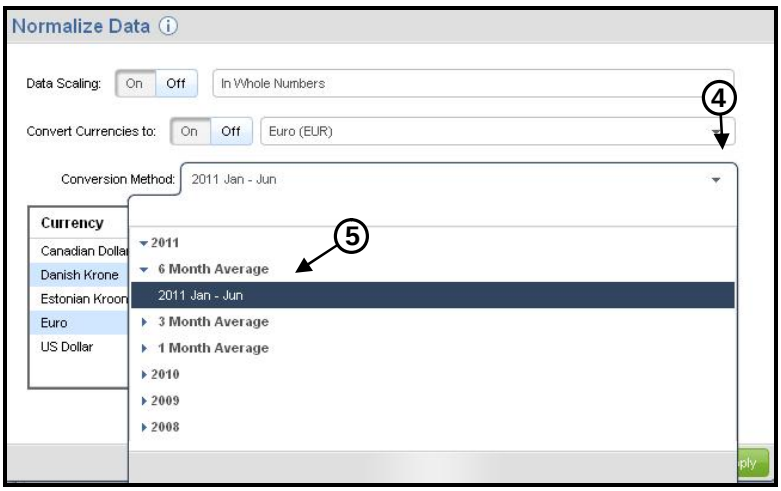
4. Click the **Conversion Method** drop-down list to display the available conversion years. Use the twisties (▸/▾) next to each year to display the Month Average options, and use to twisties next to the Month Average options to display a time period to select for the conversion method.

   Each available full year provides three conversion average options: 6 month average, 3 month average, and 1 month average. The selected average will be used to calculate the currency conversion rate.

5. Click directly on a time period to select it as a conversion method.

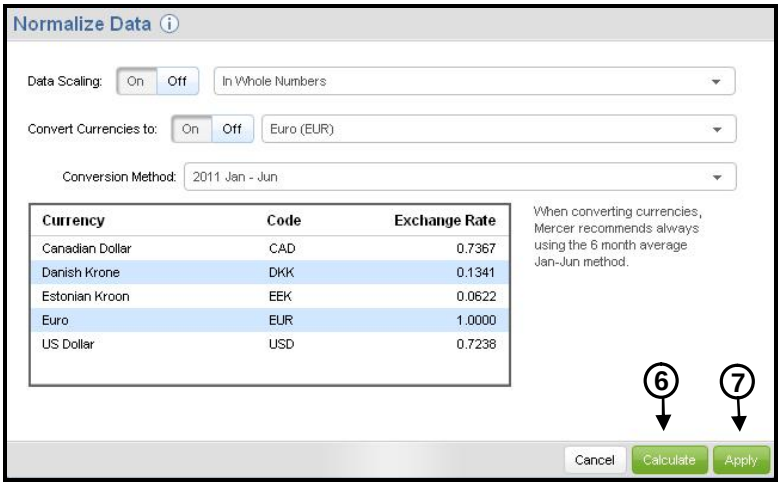






6. Click the **Calculate** button. The exchange rates for the affected currencies will display in the table at the bottom of the popup.

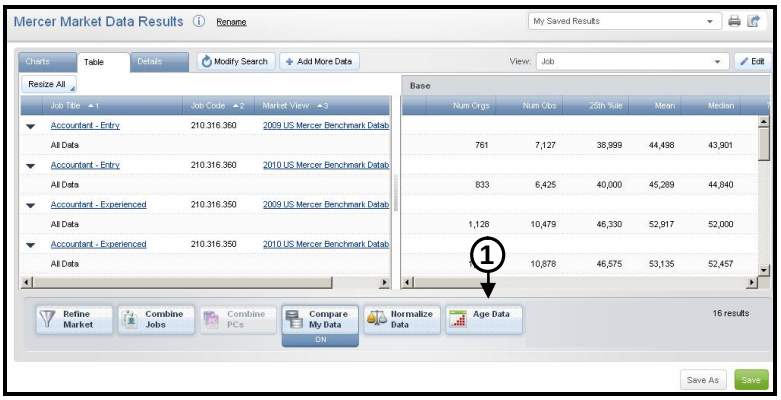
7. Click **Apply** to save the normalization settings and return to the Mercer Market Data Results page.

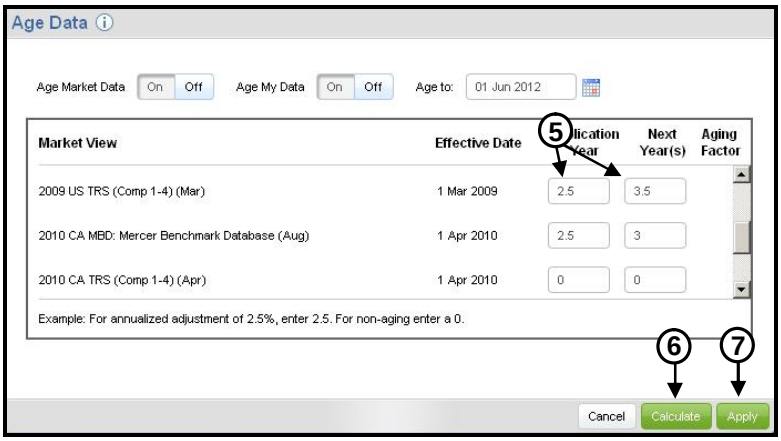


Aging Data

WIN's aging data option allows you to age market data based on the analysis you are trying to perform. This functionality allows you to define aging rates as well as "adjust-to" dates. Once data for a market view has been aged, WIN will apply the adjustment factor to all data from that market view in the data set. For more information on aging data, consult the Aging Data section of WIN Online Help.

1. On the Data Results page, click the **Age Data** button.
2. Click the **On** button next to **Age Market Data**.
3. To also apply aging factors to your organization's data, click the **On** button next to **Age My Data**.
4. Click directly in the **Age to** textbox or click the calendar icon to access the calendar control. Using the control, you can select the month and year using the drop-down lists. Click directly on the calendar to select the date.
5. Enter the aging percentages for the publication year and next year for each market view in the list. This data *must* be entered as a percentage. For all market views in the list that you don't want to age, enter "0".
6. Click **Calculate**. The aging factors for each market view will display in the **Aging Factor** column.
7. Click **Apply** to save the aging factors and return to the Mercer Market Data Results page. The data in your results set should now reflect your time adjustment settings.



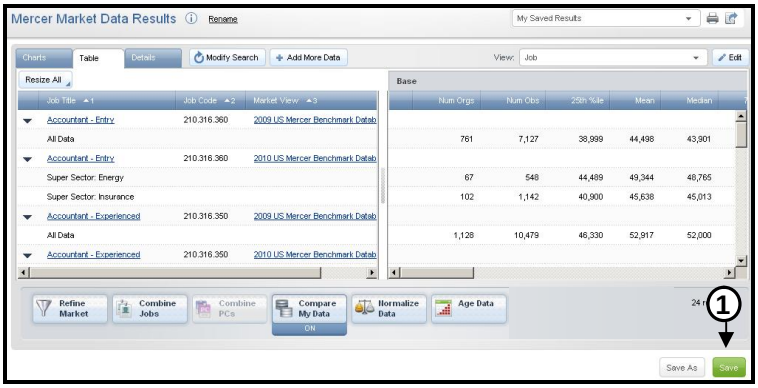


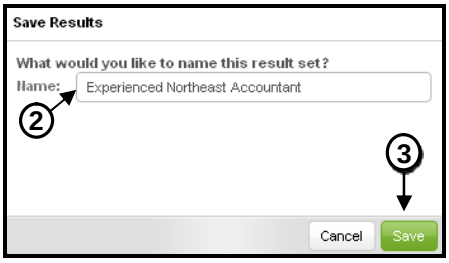
What Do I Do With My Results Set?

WIN provides you with a number of options for retaining your results set for future use:

Saving Your Results Set

1. Click the **Save As** button at the bottom of the Mercer Market Data Results page.
2. The Save Results popup will prompt you to name the result set. Enter a unique name for your analysis in the text field.
3. Click the **Save** button. Your market analysis will now appear in the **My Saved Results** drop-down list.



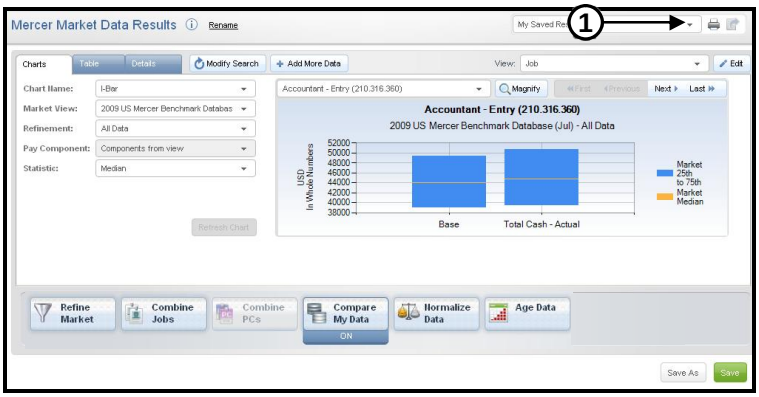


Exporting Your Results Set / Printing a Report

1. Click the **Export** or **Print** icon, located at the top right-hand side of the Mercer Market Data Results page.

The Export option is only available in the Table tab.

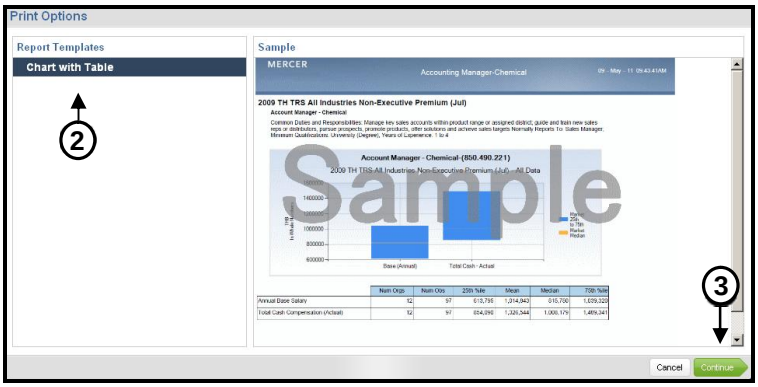
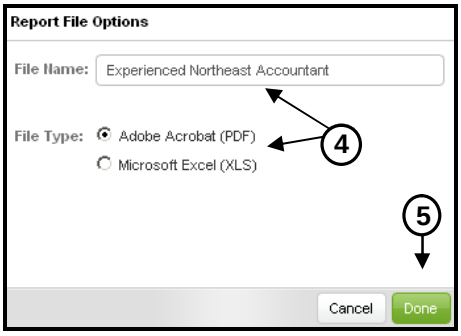
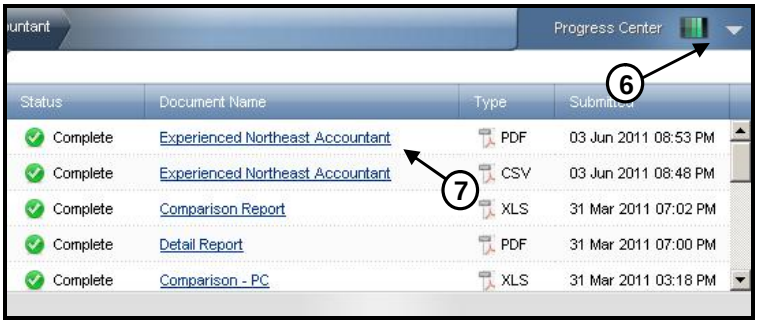
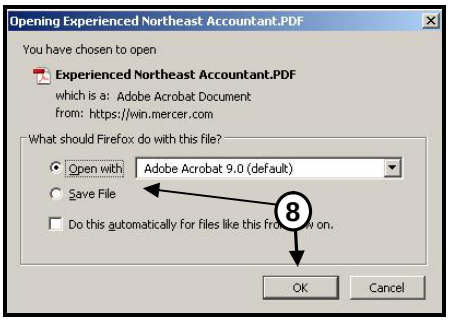
2. If you are creating a report, the Print Options popup will prompt you to select a report template. To preview a template type, simply click on the template name in the Report Templates pane, and an example of the selected report template will appear in the Sample panel.
3. To select a report template, click on the template name in the Report Templates list and click the **Continue** button.
4. A popup will prompt you to name the export or report and select the file type for your output. (such as Microsoft Excel (XLS) or Adobe PDF)
5. Click **Done**. A popup will display informing you that the item has been sent to the Progress Center for



processing.

6. Click the drop-down button next to the Progress Center icon at the top of the page. The Progress Center lists all of your recent reports and exports, as well as the dates they were submitted and their current statuses.

7. Once the status displays "Complete", click directly on the name of your document to view results.

8. A popup will prompt you to select whether to open the file or save it to your computer. Click the radio button next to your selection and click **OK**.

9. When you return to the Mercer Market Data Results page, click the drop-down button to close the Progress Center.