MERCER

TALENT • HEALTH • RETIREMENT • INVESTMENTS

Mercer WIN® | Advanced eIPE

Administrator Quick Start Guide

What is Mercer WIN Advanced eIPE?

Mercer's proprietary International Position Evaluation (IPE) is a robust, user-friendly methodology that is a key input to job and organizational design. IPE evaluates each job by measuring the value it creates within the context of your organization's unique operations. These evaluation profiles provide essential data and insight for your organizational design and HR programs.

Mercer WIN Advanced eIPE is your software management tool to deploy and fully utilize Mercer's International Position Evaluation methodology. In this Quick Start Guide we will cover how to use key functionality of Mercer WIN Advanced eIPE to administer your job leveling activities within your company.

Before getting started, check with your Mercer Consultant to take the first steps of enabling your account on the imercer.com platform. Once you have received that confirmation, you are ready to begin!

Table of Contents

Building Your Mercer WIN Advanced eIPE System 3
- Set up and Manage Mercer WIN eIPE Advanced User Profiles 3
- Set up / Edit a Grade Table 4

Creating / Editing Organizations 5
- Creating an Organization 5
- Editing an Organization 6

Adding Data to Mercer WIN Advanced eIPE via Import 7

Creating / Editing Reference Jobs 9
- Creating Reference Jobs Using MUPCS Jobs 9
- Creating Reference Jobs Without Using MUPCS Jobs 10
- Editing Reference Job Details 11

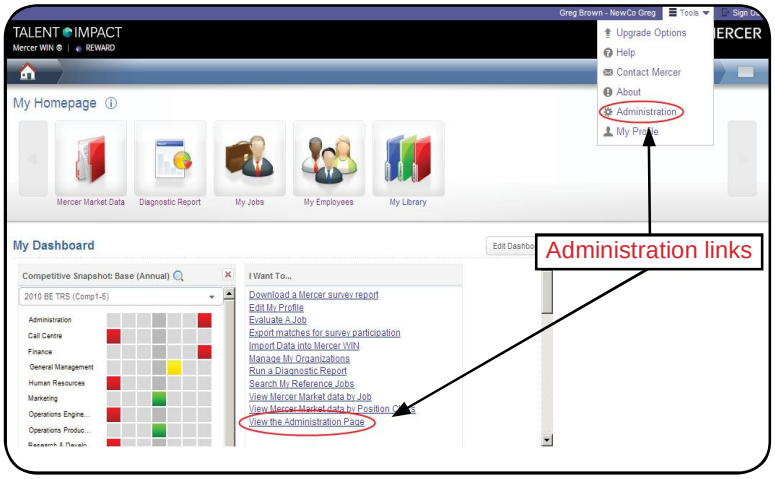
Job Architecture 12

Mercer WIN Role Function Matrix 13

Building Your Mercer WIN Advanced eIPE System

Before you can begin evaluating jobs, you must first set up your Mercer WIN Advanced eIPE system. This involves setting up Mercer WIN Advanced eIPE Users, creating a grade table that maps to your job evaluation results, and creating reference jobs to be used in the evaluation process. As the Mercer WIN Advanced eIPE Admin (or via your Mercer Consultant), you will use the Administration page to access the system administration tools necessary to build the appropriate Mercer WIN Advanced eIPE system for your company.

1. Log in to Mercer WIN Advanced eIPE and click the **View the Administration Page** link in the "I Want To..." section. Alternatively, you can click the **Tools - Administration** link in the Talent Impact Header from any page in the Mercer WIN Advanced eIPE system.

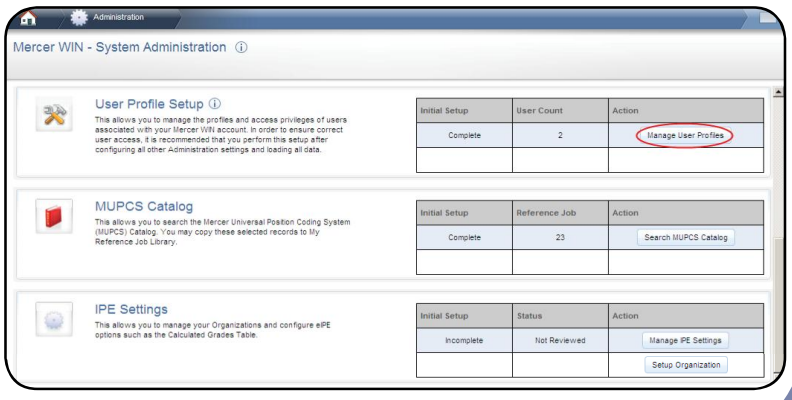


Set up and Manage Mercer WIN eIPE Advanced User Profiles

To use Mercer WIN, all users must first register at imercer.com. Once the user has completed the registration, the Mercer WIN Advanced eIPE Admin should send an email to surveys@mercer.com requesting that the new user be added to the account. An email with the subject "Add user to WIN" with the name of the user, the email address, and the company name is all that is needed to add the user to the appropriate account. Once added, an email will be generated to both the user and the Mercer WIN Advanced eIPE Admin of the account to indicate that the user has been added.

The Mercer WIN Advanced eIPE Admin should log into Mercer WIN Advanced eIPE when they receive confirmation that the user has been added, so that they may restrict the user's access as appropriate. New users have access to all organizations, countries, and job coded extensions until the access is restricted by the Admin. Please refer to the Mercer WIN Role Function Matrix at the end of this guide for help determining individual user access needs.

1. From the Administration page, click the **Manage User Profiles** button.

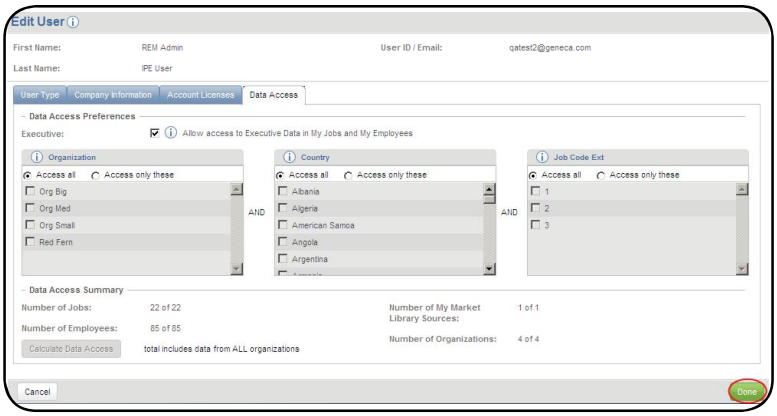


2. On the User Profile Administration page, click the **User ID** to reach the Edit User page.

3. Edit each user's access as appropriate.

4. When you have completed your user edits, click the **Done** button to return to the User Profile Administration page, and the

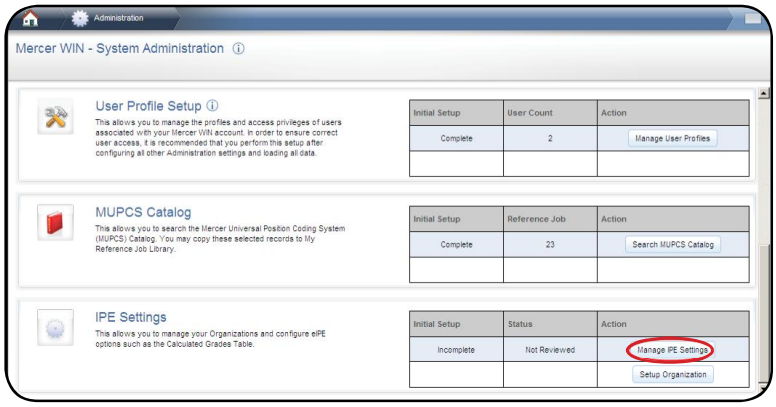
breadcrumb to return to the Administration page.



Set up / Edit a Grade Table

Your grade structure can be automatically calculated and applied to your jobs by setting up a grade table as it relates to position class score. Once set up, you can modify the grade table as required by your company. Grade table management is a Mercer WIN Advanced eIPE Admin only function.

1. To view or edit the grading structure, scroll down to the IPE Settings section on the Administration page and click **Manage IPE Settings**.

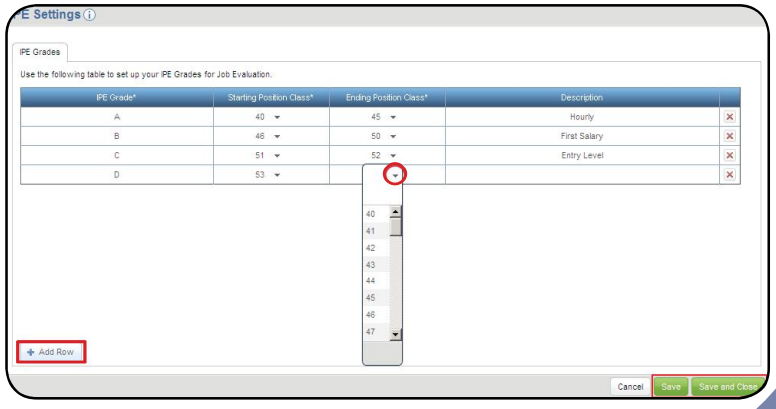


2. Use the text boxes and drop-down lists to edit parameters as appropriate for your company needs. To create a new grade, click the **Add Row** button at the bottom of the page.

   Note: Grade ranges cannot overlap.

3. Click **Save** to retain your grade table settings or **Save and Close** to save the table and return to the Administration page.

   Note: All IPE position class ranges from 40 to 87 must be covered on the IPE Grade table.



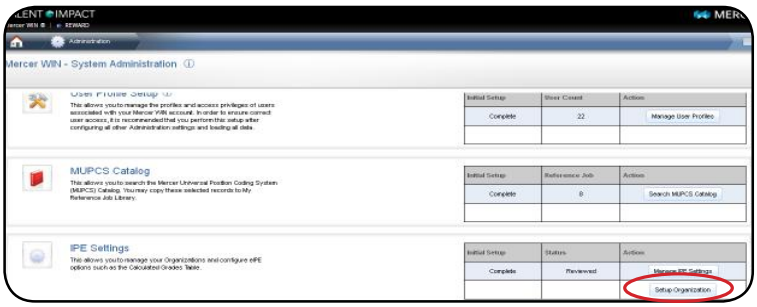
Creating / Editing Organizations

In Mercer WIN Advanced eIPE, all jobs are evaluated in the context of the organization they support, thus accurate organization information is critical.

Creating an Organization

IPE methodology depends on a variable called Size of Organization. The first step in conducting job evaluations is to set the organization parameters by determining how you define an operational unit in your company and applying key measures of that unit within the system. Please refer to the IPE handbook for further information on organizations. *Note: all users have access to the "Unassigned Org". The "Unassigned Org" cannot be sized and allows you to import jobs without choosing a specific IPE org.*

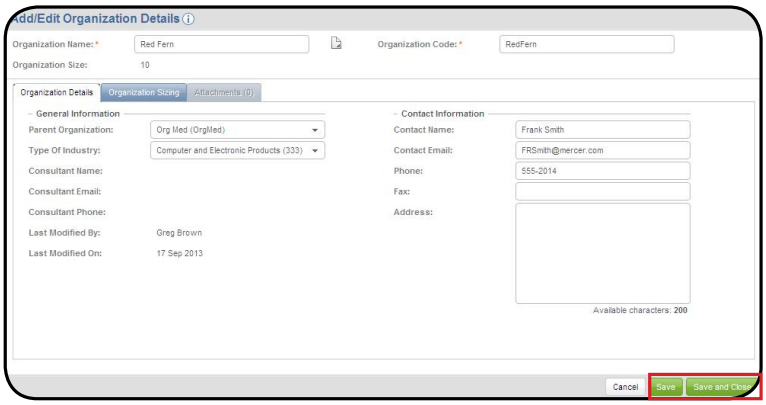
1. In the IPE Settings section of the Administration page, click **Setup Organization**.



2. On the My Organizations page you will see a list of your organizations already set up (if any). To create a new organization, click the **Add Organization** button.

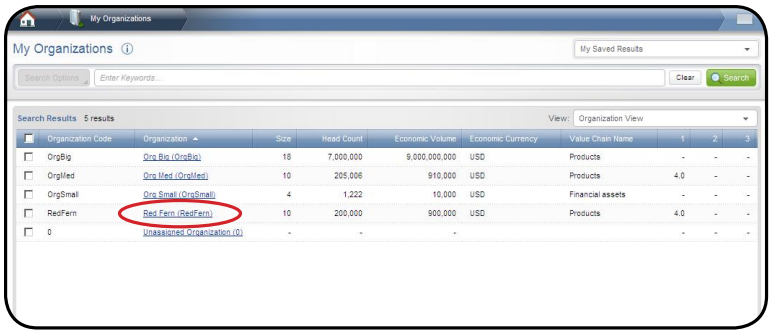
3. On the Add/Edit Organization Details page, enter the necessary information for your organization.

4. Click **Save** to retain your organization settings or **Save and Close** to save and return to the My Organizations page.



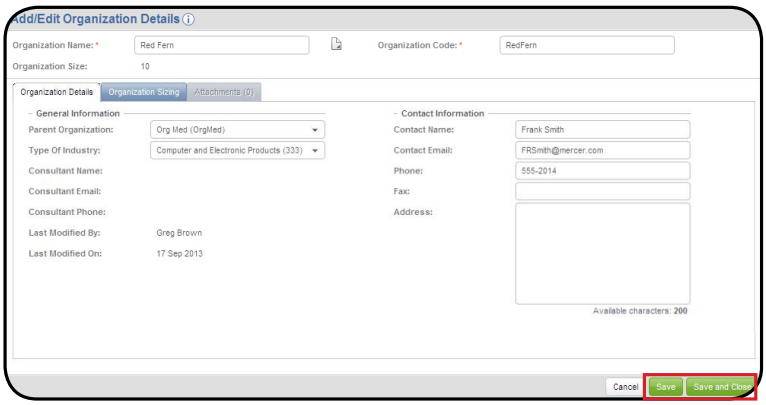
Editing an Organization

1. On the My Organizations page, click the appropriate link in the Organization column to reach the Add/Edit Organization page.

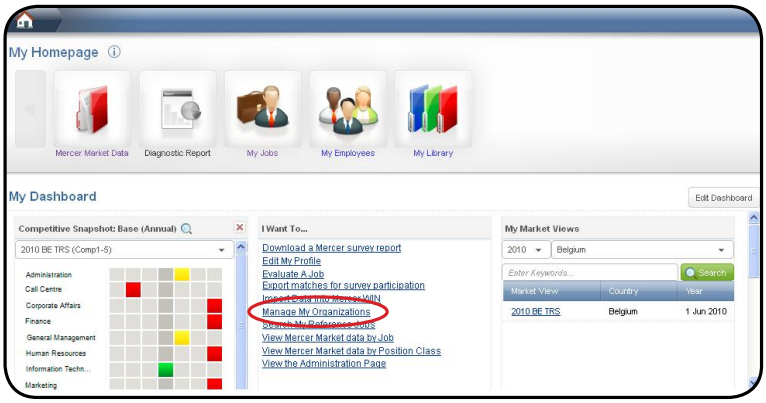


2. On the Add/Edit Organization page, you can evaluate and adjust items as needed.

3. Click **Save** to retain your organization settings or **Save and Close** to save and return to the My Organizations page.



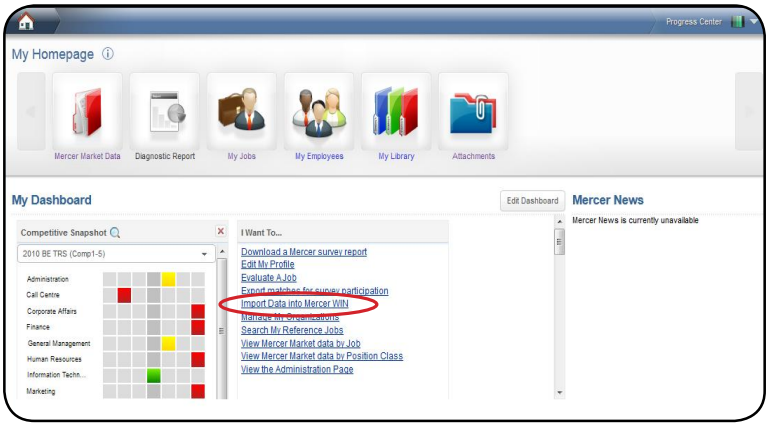
Note: You can also access the organization data via the "I Want To..." link on the homepage called Manage My Organizations.



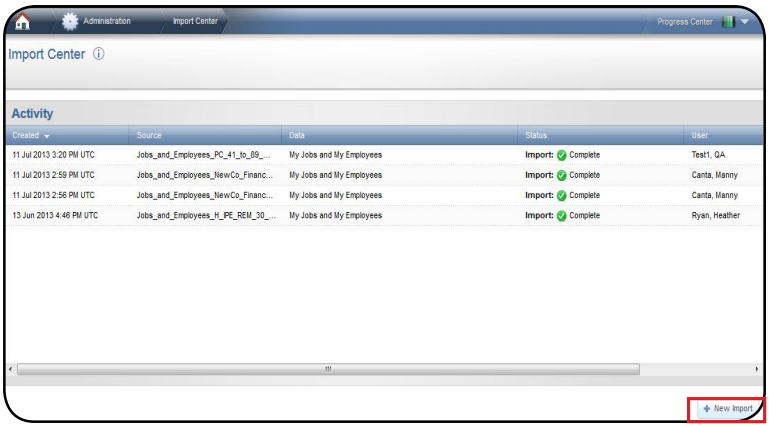
Adding Data to Mercer WIN Advanced eIPE via Import

Within Mercer WIN Advanced eIPE you have the ability to import jobs, employee data, and market data into My Jobs, My Employees, and My Market Library, via a Mercer provided template. If you use an HRIS or other job database system, you can use imports to bring your data into Mercer WIN Advanced eIPE. You can also add job evaluation factor and dimension values as part of the import process.

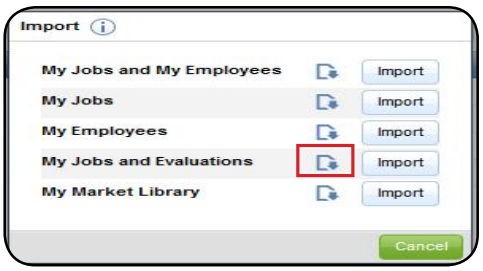
1. To access the Import Center, click the **Import Data into Mercer WIN** link in the "I Want To…" section of the homepage. There, you will be able to download the template and import your Job, Evaluation, Employee, and Other External Data into Mercer WIN Advanced eIPE.



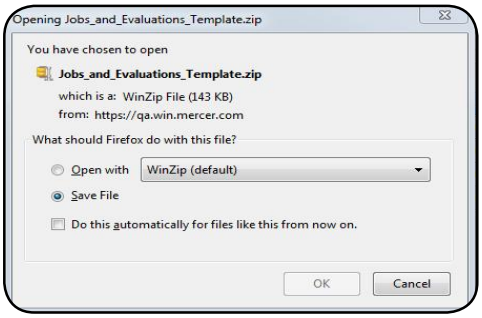
2. Click the **New Import** button on the Import Center page.



3. Click the **download icon** to download a copy of the import template and instructions.

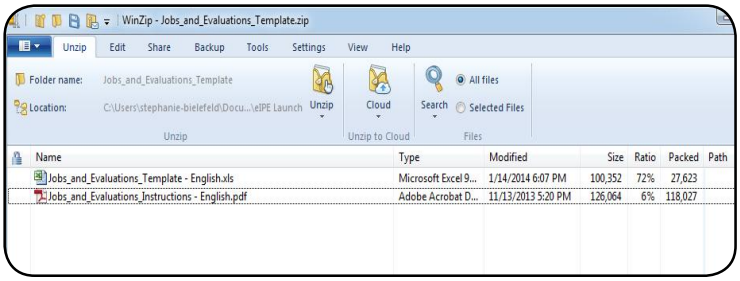


4. You will be prompted to choose whether to Open or Save the Template files.



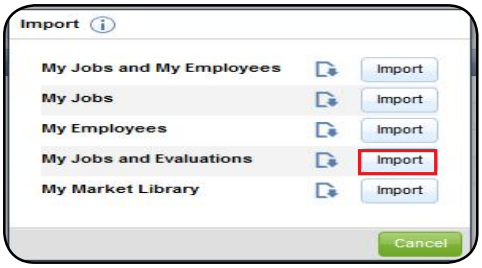
5. The zip file will contain an Excel spreadsheet for the import and a set of instructions.

Note: It is important to carefully follow the instructions in order to successfully import your data.



6. When you have completed populating the template with your job data, click the **Import** button to import data into Mercer WIN Advanced eIPE.

Note: The template instructions will download in the language specified in My Profile.

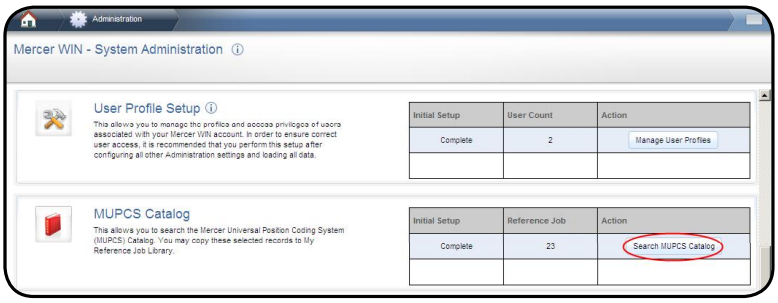


Creating / Editing Reference Jobs

Creating Reference Jobs Using MUPCS Jobs

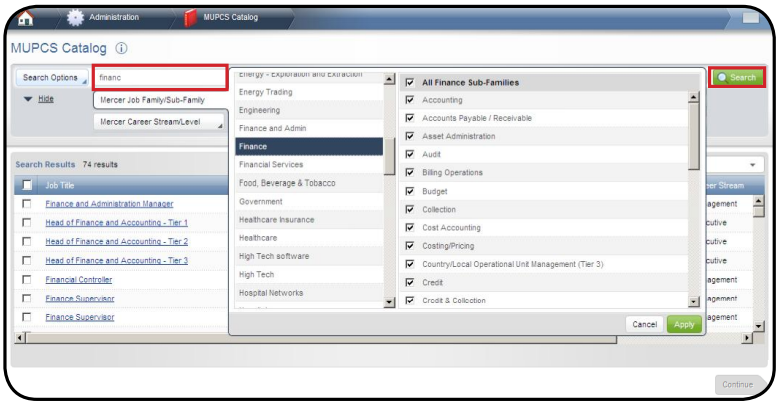
You can easily search through the Mercer Universal Position Coding System (MUPCS) Catalog to locate jobs and determine if a Mercer job can be used as a basis for your reference job.

1. On the Administration page, scroll to the MUPCS Catalog section and click **Search MUPCS Catalog**.

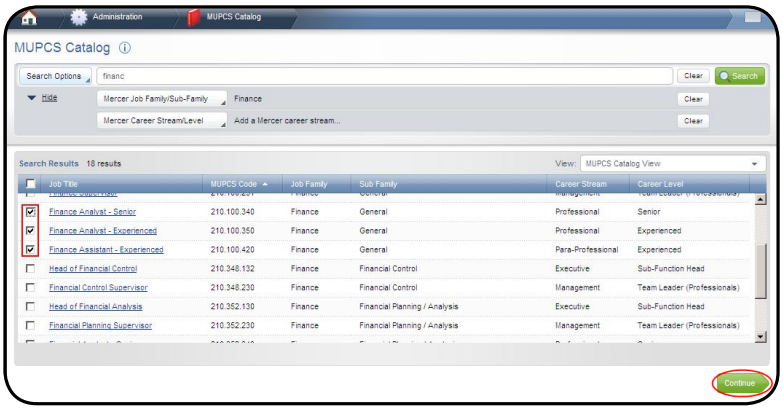


2. Enter a keyword in the Search Options section, and select appropriate items from the Mercer Job Family/Sub Family, and/or Mercer Career Stream/ Level if needed to narrow your search. Click **Search**.

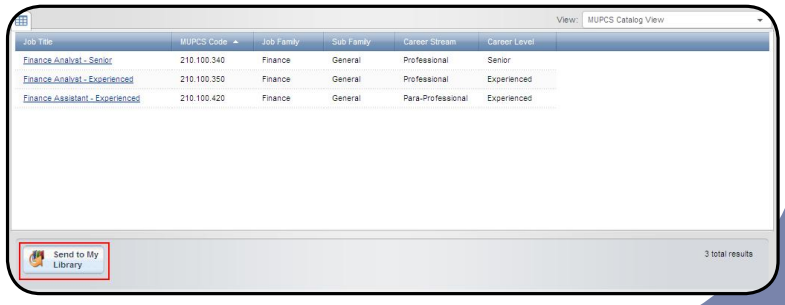
   Note: Only MUPCS jobs with reference evaluations will be returned in your search results.



3. Select the checkbox next to the job(s) that best meets your criteria for a reference job, then click **Continue**. You may click on the **Job Title** link to see more information about a particular job such as objectives and accountabilities, as well as a reference evaluation.



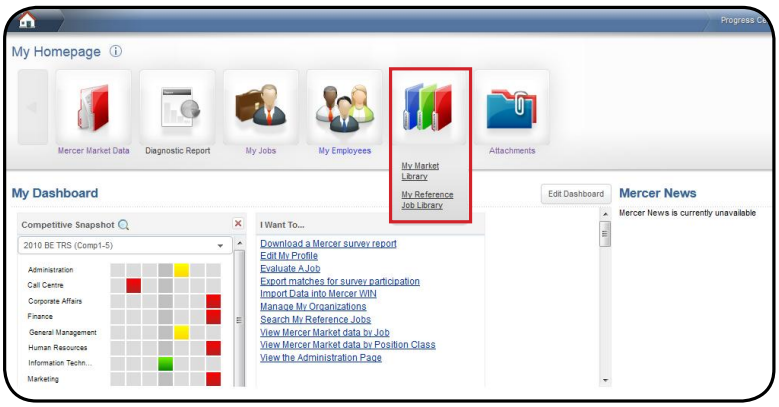
4. From the MUPCS Catalog results page, click the **Send to My Library** button to copy the jobs to the Reference Jobs Library.
   Note: If you click Send to My Library for a reference job that you have already copied from MUPCS, you will be warned prior to proceeding with an overwrite.



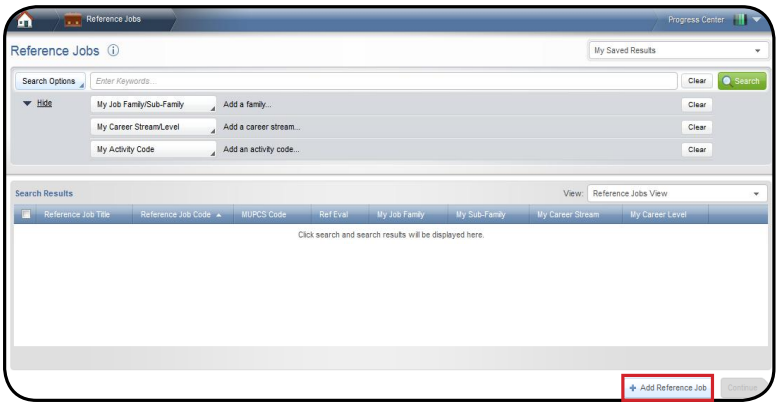
Creating Reference Jobs Without Using MUPCS Jobs

You may create your own reference jobs to suit your needs and add them to your Reference Job Library.

1. Click on the **My Library** button on the Mercer WIN Advanced eIPE homepage and choose **My Reference Job Library.**

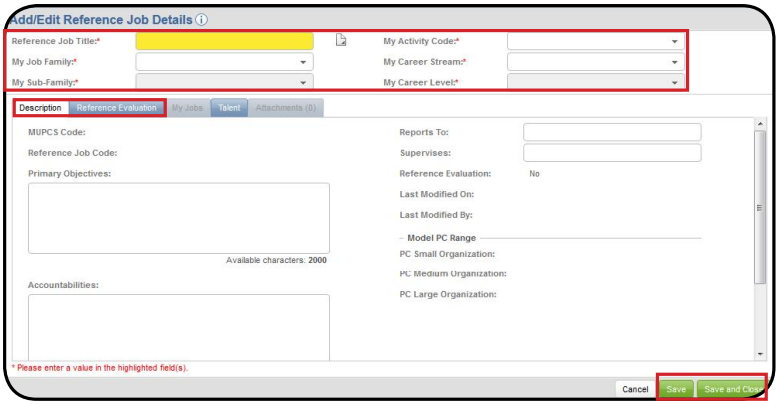


2. On the Reference Jobs page click the **Add Reference Job** button.



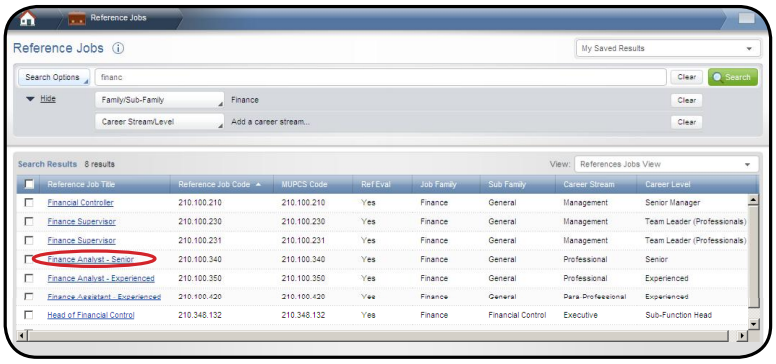
3. Input values for the job on the header section, Description tab, and Reference Evaluation tab. Then click **Save and Close** to return to the Reference Jobs screen.

   *Note: All fields with an * are required.*

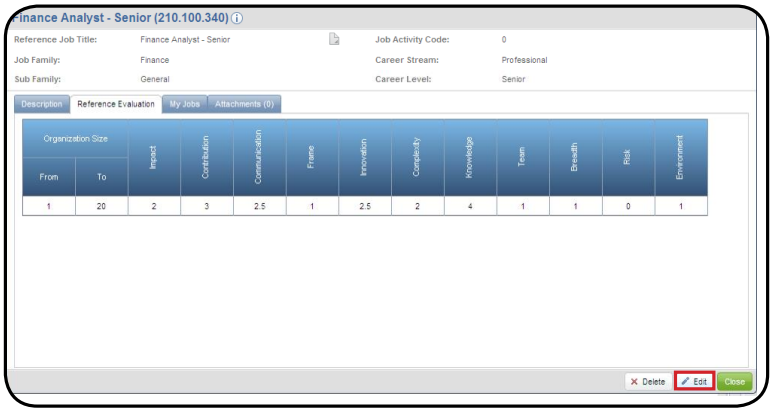


Editing Reference Job Details

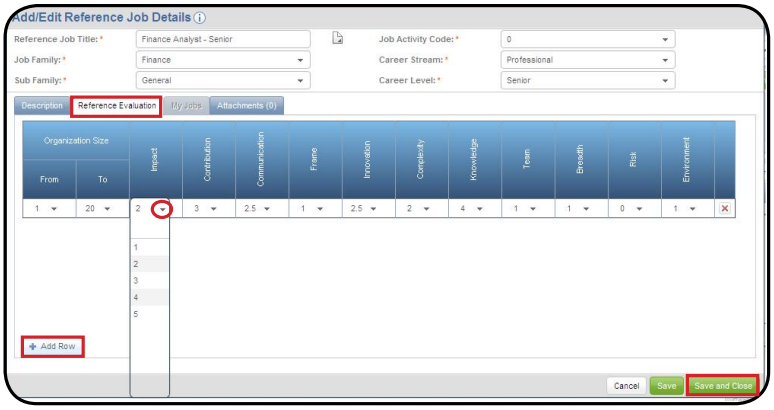
On the Reference Jobs search page, you can view a list of all of your reference jobs and determine if you would like to use them as a starting point for a job evaluation. You can also modify a reference job by completing the following steps:



1. To review your Reference Jobs use the **My Library** button on the homepage and select **My Reference Jobs Library**. On the Reference Jobs search page, click the **Job Title** of the job that you wish to work with.



2. On the Add/Edit Reference Job Details pop up click the **Edit** button. You can then edit the Reference Job Details and the Reference Evaluation data as needed.

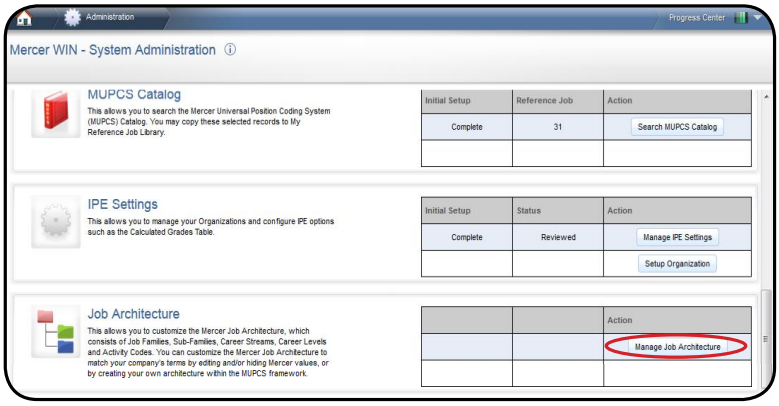


3. To change reference evaluation data, click the **Reference Evaluation** tab. Use the drop-down lists to modify evaluation values. To add a new row to the reference evaluation grid, click the **Add Row** button.

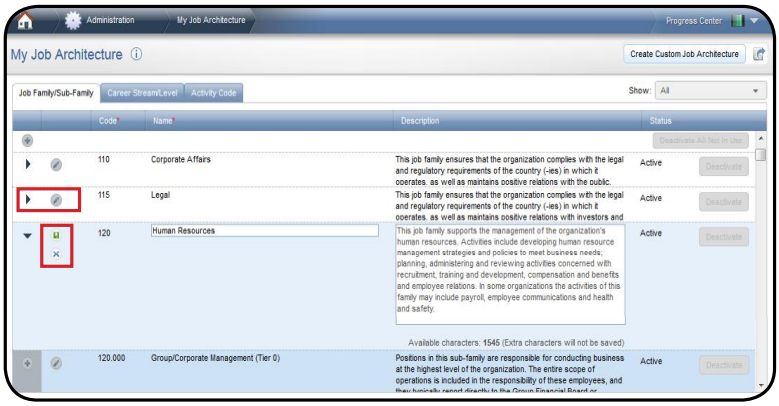
4. When you have completed your edits, click **Save and Close** to save your changes and return to the Reference Jobs search page.

Job Architecture

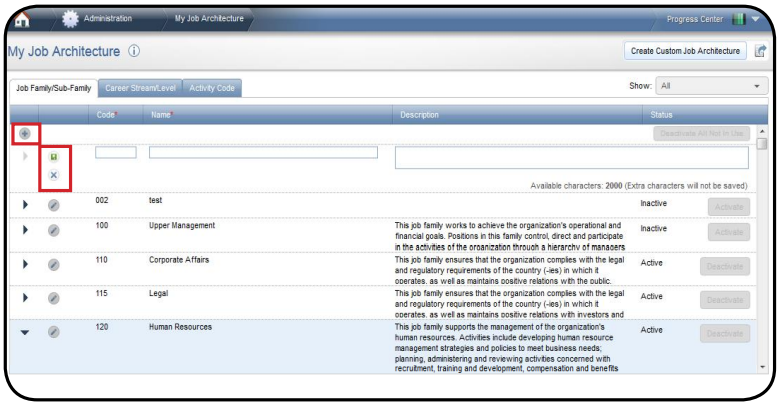
1. In the Job Architecture section of the Administration page, click **Manage Job Architecture**.



2. Click the **arrow** to the left of the Name field for the Job Family/Sub-Family that you wish to edit. Enter changes to the Name and/or Description in the space provided. Click the **pencil icon** to edit the Name or Description. Then click the **disk icon** to save or the **X icon** to cancel.



3. Click the **plus sign icon** to add a new Job Family/Sub-Family. Enter the Code, Name, and Description in the space provided and click the **disk icon** to save your changes.



Mercer WIN Role Function Matrix

When the Mercer WIN Advanced eIPE Admin receives email confirmation that a Mercer WIN Advanced eIPE User has been added, he/she should log in to Mercer WIN Advanced and restrict the user's access as appropriate. The Mercer WIN Role Function Matrix may be used to help determine individual user access needs. Mercer WIN Advanced eIPE Admins and Mercer WIN Advanced eIPE Users are eligible for all Mercer WIN Advanced eIPE functionality. During your initial set up, you may ask for this functionality to be turned off if needed, otherwise the Mercer WIN Advanced eIPE Admin and Mercer WIN Advanced eIPE Users will be set up to also have Mercer WIN Advanced role capability as noted in the matrix.

	Role				
Function	IPE Admin	IPE User	WIN Admin	WIN Advanced User	WIN Core User
Search/Export/Print My Organizations Data	X	X	X		
View Organizations	X	X	X		
Add Organizations	X	X	X		
Edit Organizations	X	X	X		
Size Organizations	X	X	X		
Delete Organizations	X	X	X		
Copy Organizations	X		X		
Organization (Edit View)	X	X	X		
Search/Export/Print My Reference Job Library Data	X	X			
View Reference Jobs	X	X			
Add Reference Jobs	X				
Edit Reference Jobs	X				
Delete Reference Jobs	X				
Search/Export/Print My Jobs Data	X	X	X	X	
View My Jobs	X	X	X	X	
Add My Jobs	X	X	X	X	
Edit My Jobs	X	X	X	X	
Import My Jobs	X		X		
Delete My Jobs	X	X	X	X	
Evaluate My Jobs	X	X			
Market Price My Jobs			X	X	
View Row Edit (My Jobs)	X	X			
View Job Modeling Scenarios	X	X			
Copy Jobs	X	X	X	X	
Determine Reference Job from My Job	X	X			
Create Jobs from Reference Jobs	X	X			
Import Job Evaluations Data	X		X		

	Role				
Function	IPE Admin	IPE User	WIN Admin	WIN Advanced User	WIN Core User
Search/Export/Print My Employees Data	X	X	X	X	
View Employees	X	X	X	X	
Add Employees	X	X	X	X	
Edit Employees	X	X	X	X	
Import Employees	X		X		
Delete Employees	X	X	X	X	
Search Mercer Market Data (MMD)			X	X	X
View Mercer Market Data (MMD)			X	X	X
View Diagnostic Reports			X	X	X
View Job Evaluation Mapping Report	X	X			
View Cross Tab Report	X	X	X	X	
Add MMD to My Market Library (MML)			X	X	
Add External Data to MML			X		
Search/View MUPCS Catalog	X				
Manage IPE Grade Table	X				
Allow Access to Employees in WIN	X		X		
Manage Default Organization Sizes	X				
Manage Job Architecture	X				
Search Attachments	X	X	X	X	
View IPE Charts	X	X			