MERCER

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Mercer WIN® | Advanced eIPE

User 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.

Where do I find the Mercer WIN Advanced eIPE Functionality?

Mercer WIN has been augmented to contain functionality to support the Mercer IPE methodology. Although you might have been a user of Mercer WIN in the past, in order to use this functionality you will need to be set up to access Mercer WIN Advanced eIPE features. These features are integrated into My Jobs, My Employees, and My Library. Please contact eipe.support@mercer.com or your Mercer Consultant to gain access if these items are not illuminated on the homepage.

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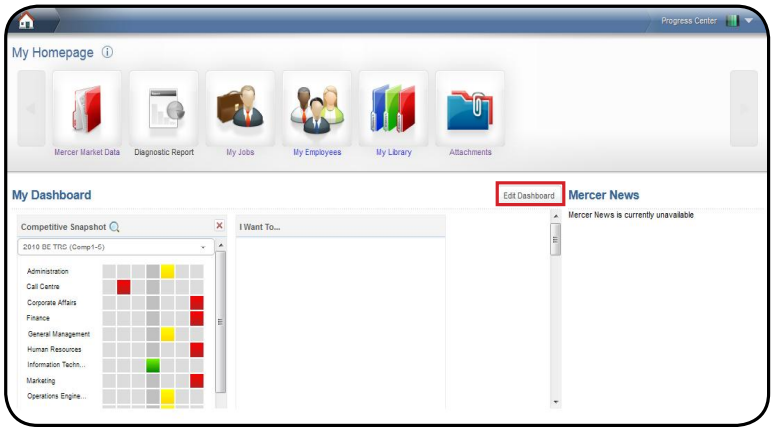
Editing the Dashboard

The Edit Dashboard option gives you to access all possible dashboards available in Mercer WIN Advanced eIPE. IPE specific charts allow you to view Position Class Distribution, Percentage Evaluated, and Dispersion.

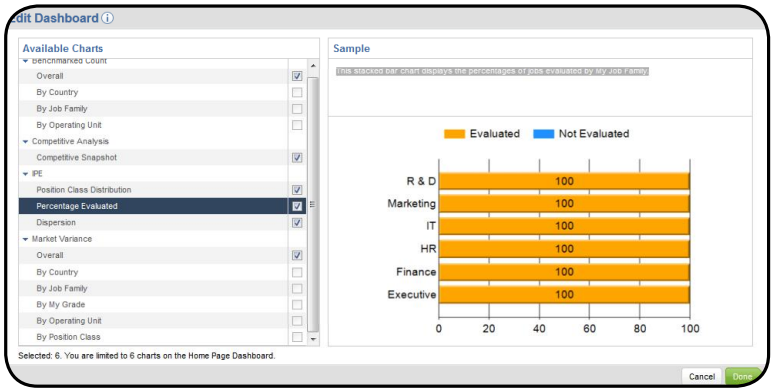
1. Click the **Edit Dashboard** button on the Mercer WIN Advanced eIPE homepage.



2. There are 3 charts available in the IPE section.

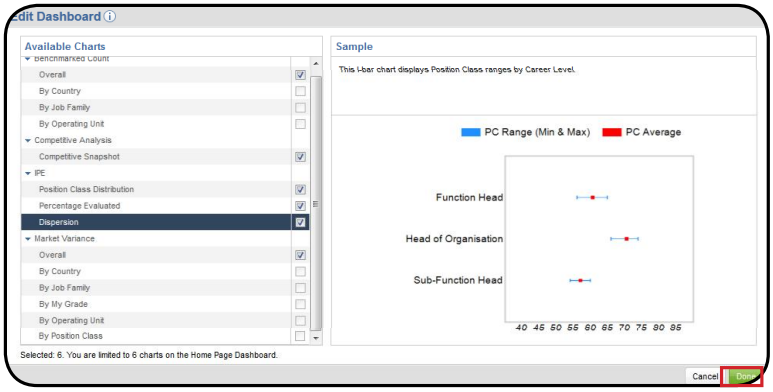
   The *Position Class Distribution* chart is a bar chart that show the Position Class distribution by Jobs or Employees.

   The *Percentage Evaluated* chart is a stacked bar chart that displays the percentages of jobs evaluated by My Job Family.



The *Dispersion* chart is an I-bar chart that displays Position Class ranges by Career Level.

3. Select the chart that you wish to view on your Dashboard, then click **Done**.

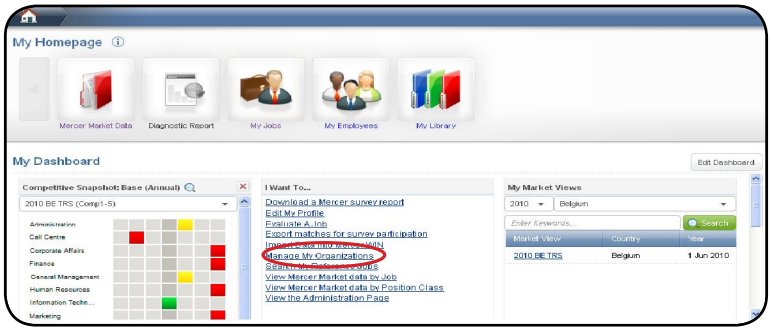


Creating / Editing Organizations

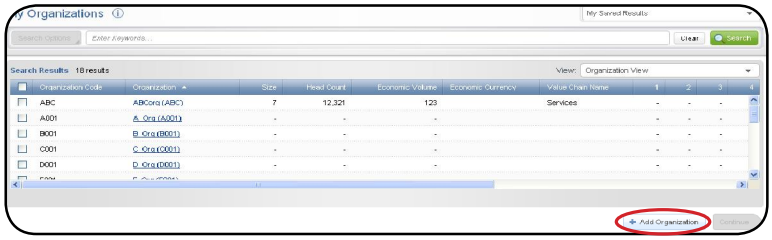
In Mercer WIN Advanced eIPE, all jobs are evaluated in the context of the organization they support, thus accurate organization information is critical.

Creating an Organization

1. Click the **Manage My Organizations** link in the "I Want To..." section of the homepage

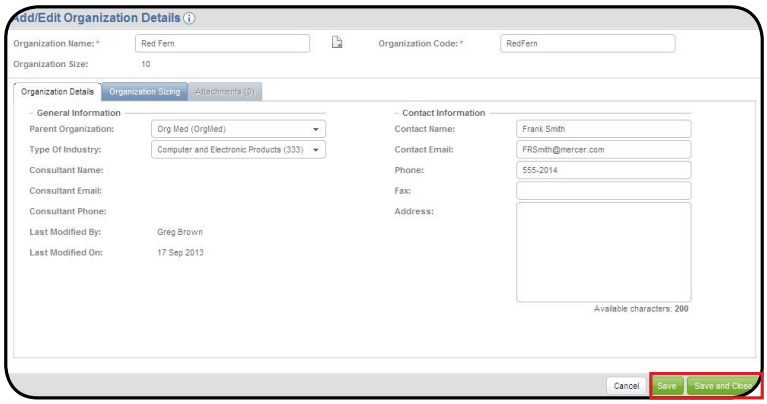


2. On the My Organizations page you will see a list of your organizations. To create a new organization, click the **Add Organization** button.



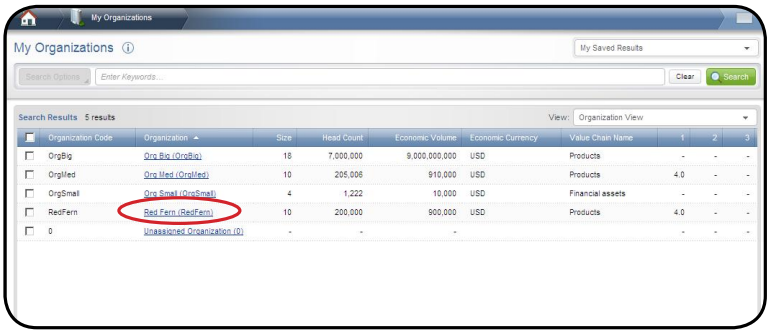
3. On the Add/Edit Organization Details page, enter the necessary information for your organization.

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



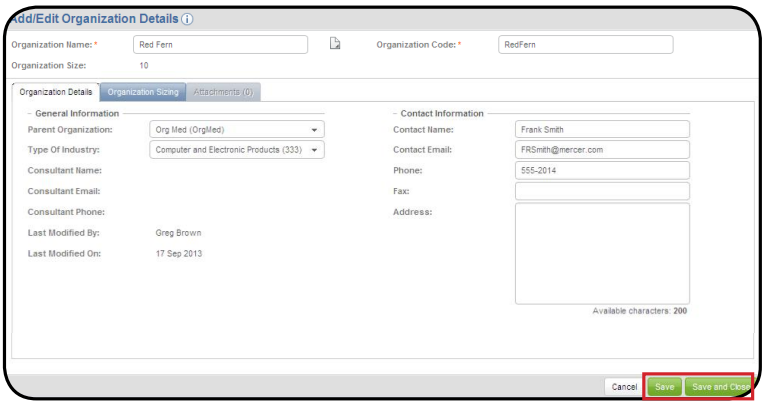
Editing an Organization

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



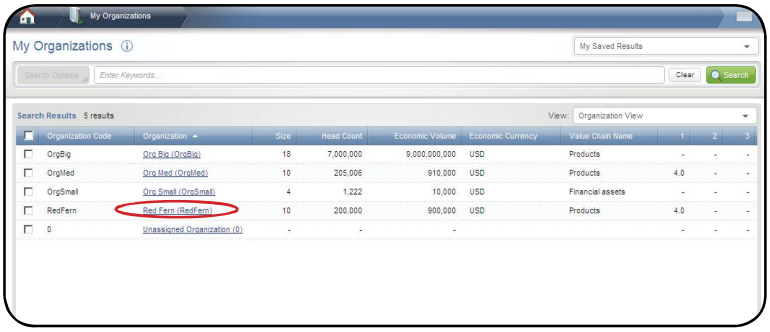
2. On the Add/Edit Organization page, you can evaluate and adjust items as needed.

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

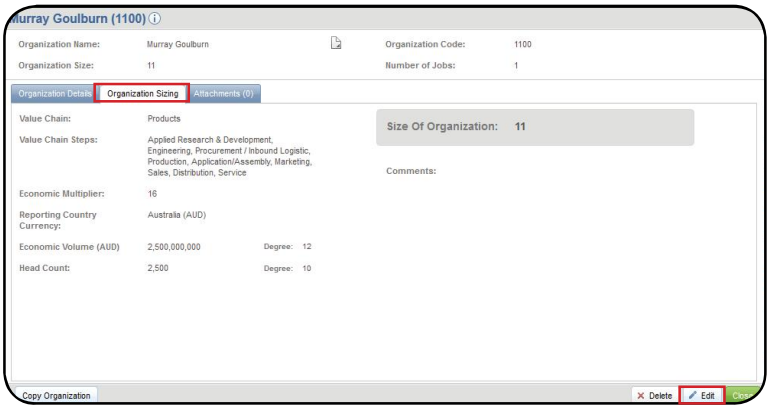


Sizing an Organization

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



2. Click the **Organization Sizing** tab and click the **Edit** button.

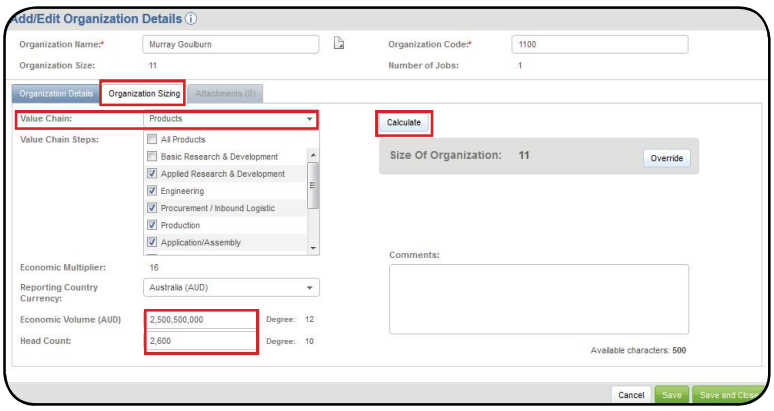


3. Each organization's size is based on 3 factors: sales volume, head count, and the results of Mercer's proprietary value chain methodology. Use the text fields to edit Economic Volume and Head Count and click the **Value Chain Name** drop down to select the value chain steps associated with the organization. Click **Apply** once a value chain's steps have been selected.

   Note: You can only select one value chain at a time. To change value chains, you need to de-select the existing value chain first.

4. Once you've made your changes, click **Calculate** to reset the Economic Multiplier and Size of Organization based on your edits.

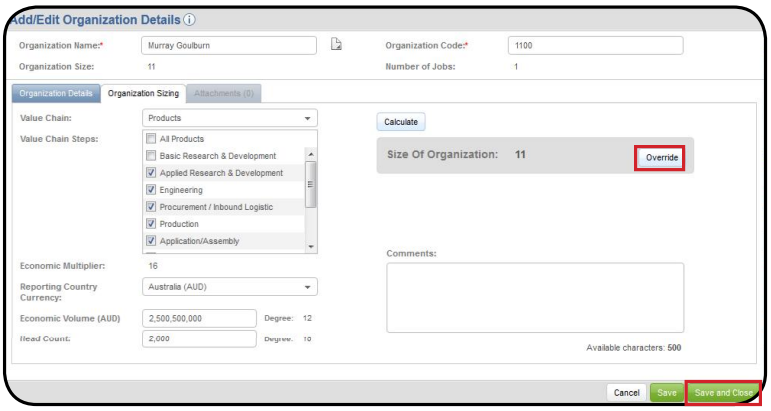
   Note: Optionally, you can leave a notation in the Comments field to record the changes made.



5. You may choose to override the calculated value for the organization size. To do this on the Organization Sizing tab, select the **Override** button next to the Size of Organization calculation (note: you must first perform a calculation before overriding). A drop down will appear where you can select the size of the organization you wish to use. Then click **Save** to apply the override value.

   The system will show the calculated size, but in all other areas of the system, the override size will be displayed and used in calculation.

6. Click **Save and Close** to save your changes and return to the My Organization page.

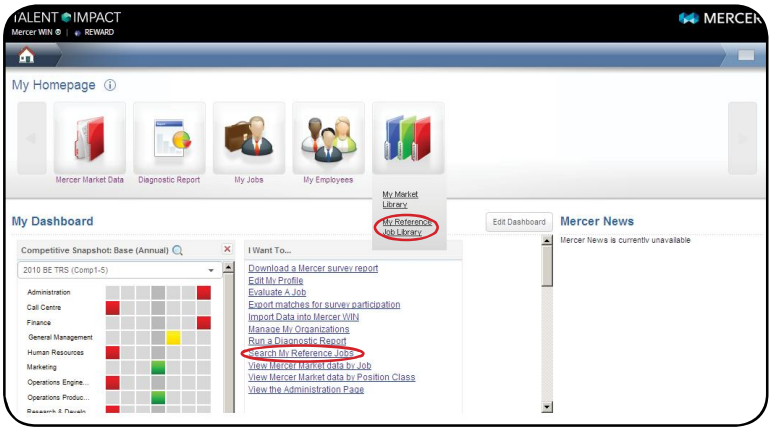


Searching Reference Jobs

The Reference Job Library contains the reference jobs from the Mercer MUPCS Catalog that were imported by your Mercer WIN Advanced eIPE Admin into your Mercer WIN Advanced eIPE system. Reference jobs can be used as a basis for structuring and evaluating your jobs so you don't have to start from scratch, and all users can share a common basis for a job.

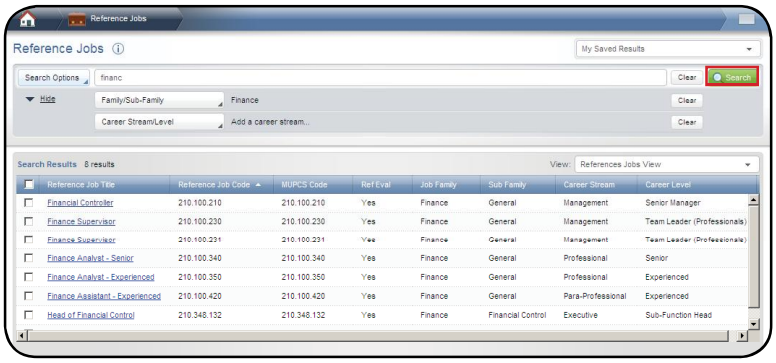
Searching the My Reference Jobs Library

1. To access reference jobs from the homepage, click the **Search My Reference Jobs** link in the "I Want To…" section or click the **My Library** icon in the My Homepage ribbon and select the **My Reference Job Library** link.



2. The Reference Jobs search page allows you to query the Reference Job Library by keyword and provides the option of filtering your search by Job Family/Sub-Family and Career Stream/Level. Enter your search criteria and click the **Search** button.

3. The results of the search will display in grid format at the bottom of the page.

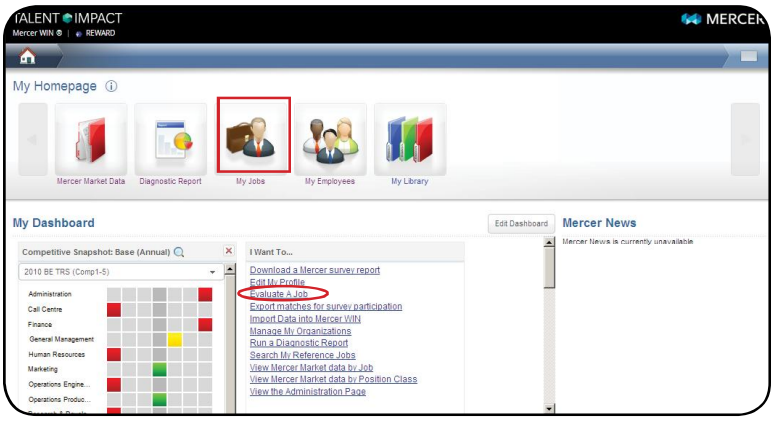


Performing Job Evaluations

Mercer WIN Advanced eIPE allows you to perform job evaluations in three ways depending on the type of support you need. To work on a specific job, you may use guidance grids detailing the IPE methodology or a summary screen where you can apply job factor scores directly. If you wish to evaluate multiple jobs at one time, you may also use "row editing" which displays up to 20 jobs and their factors and dimensions for editing. In addition, you may perform a sensitivity analysis on a particular job via a modeling screen.

Selecting a Job for Evaluation

1. Click the **Evaluate a Job** link in the "I Want To…" section on the Mercer WIN Advanced eIPE homepage or click the **My Jobs** icon in the My Homepage ribbon.



2. The My Jobs search page lets you query jobs by keyword and allows you to refine your search using the filter options at the top of the page. Enter your search criteria and click the **Search** button.

3. On the Search Results pane, click the link in the Job column for the job you wish to evaluate.

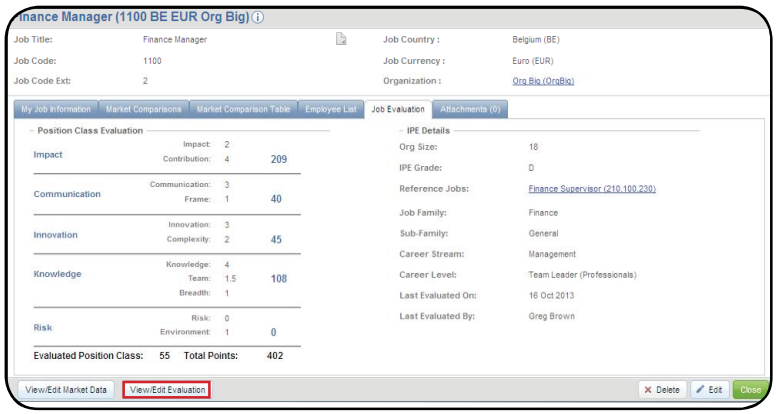
   Note: Data security dictates what jobs each user has access to. If you cannot view a job that you wish to evaluate, contact your Mercer WIN Advanced eIPE Admin to adjust your security settings.

Performing a Job Evaluation Using Grid Edit

Grid Edit provides guidance for selecting your job evaluation parameters. If your job has not been evaluated, the system will automatically open to the grid evaluation page.

1. Click the **View/Edit Evaluation** button at the bottom of the Job Evaluation page.

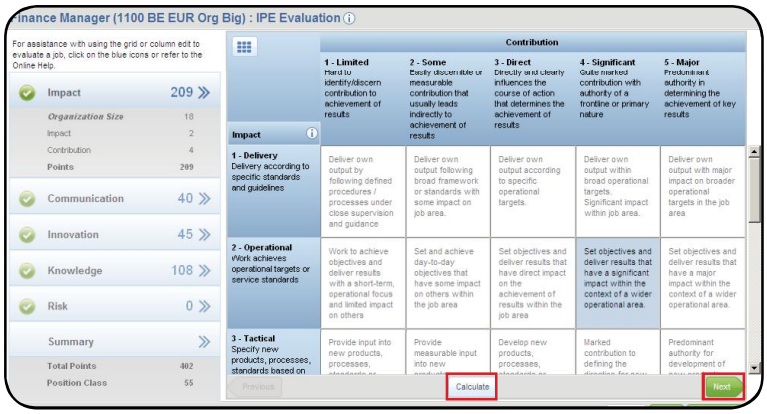
   Note: The organization must be sized in order to see the View/Edit Evaluation button.



2. The IPE Evaluation page will display. If you are on the summary IPE Evaluation page you can access Grid Edit by clicking the factor headers on the left side of the page.

   In Grid Edit, you can make selections for each factor by clicking directly on a description on the grid. Carefully review the factor options and make the selections that best fit your job. Use the **Next** button to navigate to the next factor or click directly on the factor header on the left side of the page.

   To learn more about a factor, click the ⓘ icon on the grid.



3. Once you have made all your selections, click **Calculate** to update the evaluation factors.

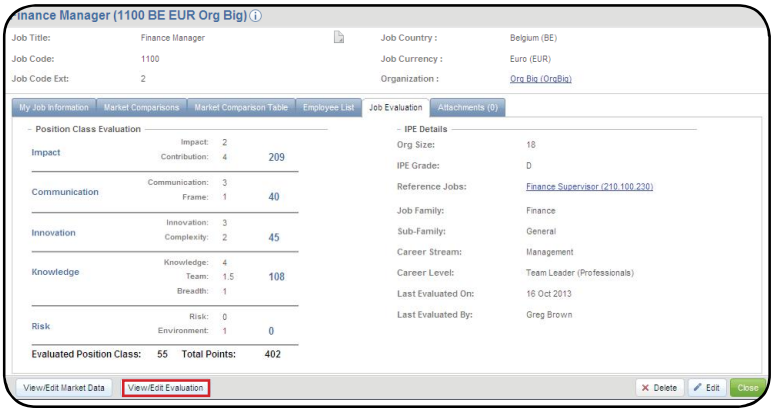
   Note: The grid will only allow for legal selections based on Mercer rules. If you wish to evaluate a particular factor outside these rules, use the summary edit page, which allows for all possible dimension selections.

Performing a Job Evaluation Using a Summary Process

For those familiar with the job evaluation process, Mercer WIN Advanced eIPE offers a simple column formatted style for editing your job evaluation data. If the job is fully evaluated, this will be the default edit page.

1. Click the **View/Edit Evaluation** button at the bottom of the Job Evaluation page.

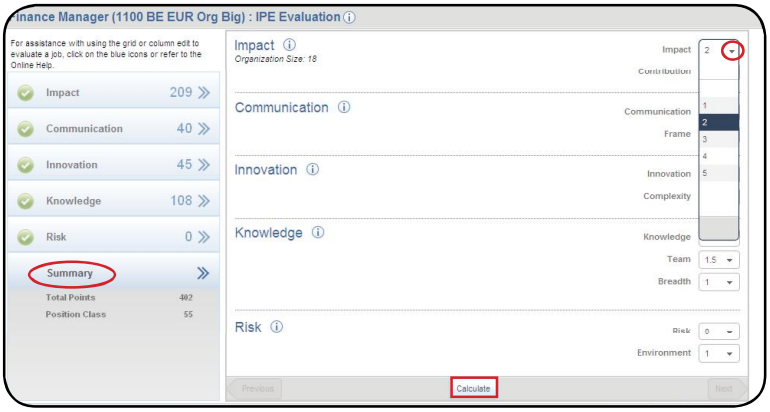
   Note: The organization must be sized in order to see the View/Edit Evaluation button.



2. You will be directed to the summary IPE Evaluation page. The column edit options will display on the right side of the page. Use the drop-down options to make adjustments to each evaluation factor.

   *Note: You will be directed to the summary page if the job has been previously evaluated. If no evaluation data exists, then you will first land on the Impact Factor grid and may select to move to the summary page by clicking **Summary**.*

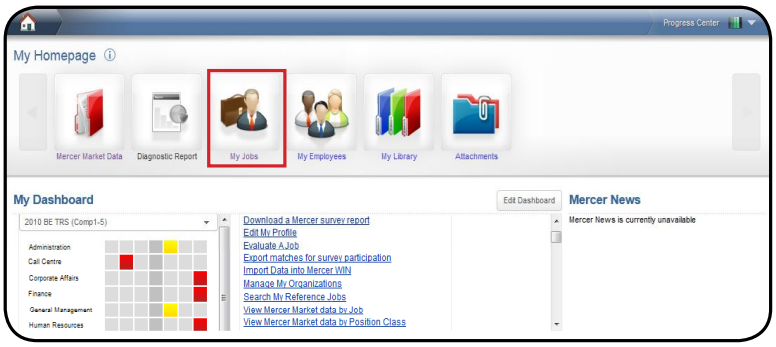
3. Click **Calculate** to update the evaluation factors.



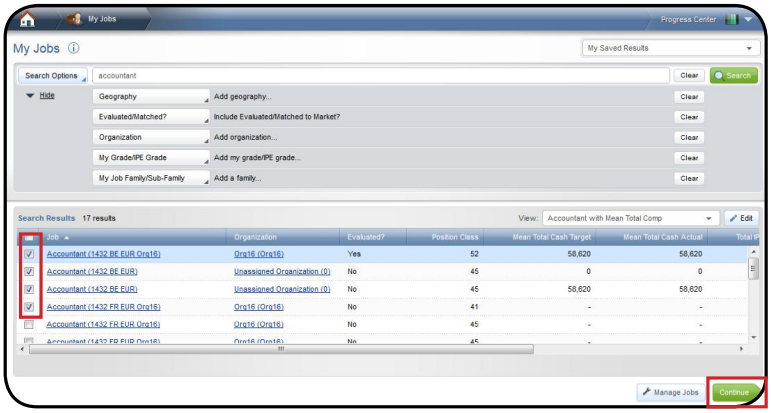
Performing a Job Evaluation Using Row Edit

Row edit capability allows you to evaluate up to 20 jobs at one time, side by side.

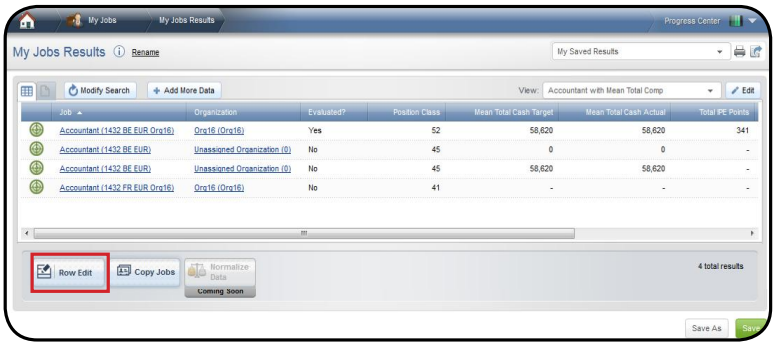
1. Click on the **My Jobs** button on the Mercer WIN Advanced eIPE homepage.



2. Search for a particular set of jobs, select those jobs and click **Continue**.

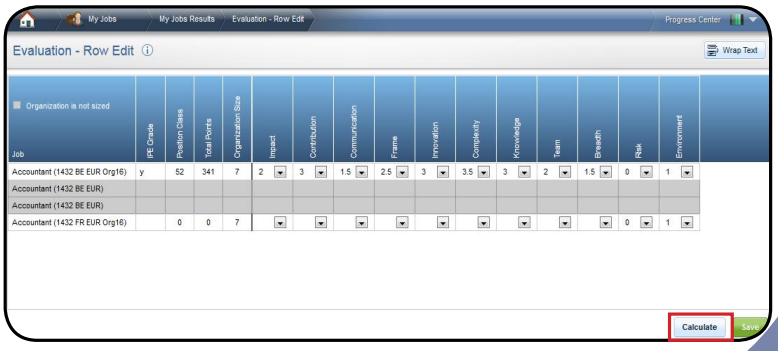


3. On the My Job Results page, click **Row Edit.**



4. Use the Evaluation - Row Edit page to apply changes to the jobs. If a job is grayed out, that job is not in a sized organization and therefore unable to be edited.

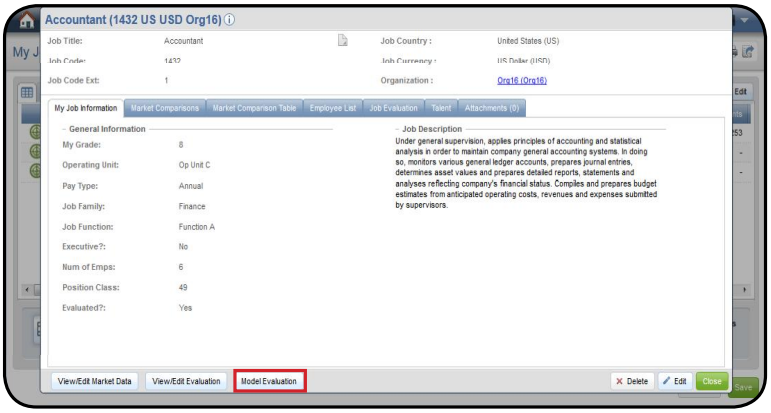
5. Click the **Calculate** button to update all Position Class values and corresponding Total Points and Grades (if using the IPE Grade table).



Modeling

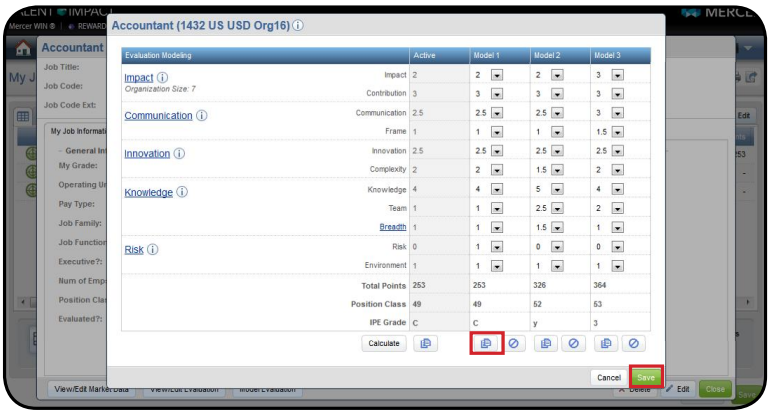
Modeling a job evaluation allows you to test three different evaluations at one time to perform sensitivity analysis in regard to IPE dimension values. You may save the models for later use or apply them as the official evaluation of the job.

1. On the job details screen, click the **Model Evaluation** button on the lower part of the screen.



2. The modeling screen will open as a pop-up window. You can use the icons at the bottom of each column to copy the existing evaluation.

3. Perform your sensitivity analysis and then select the particular evaluation to apply to the job or just save the models for future use.

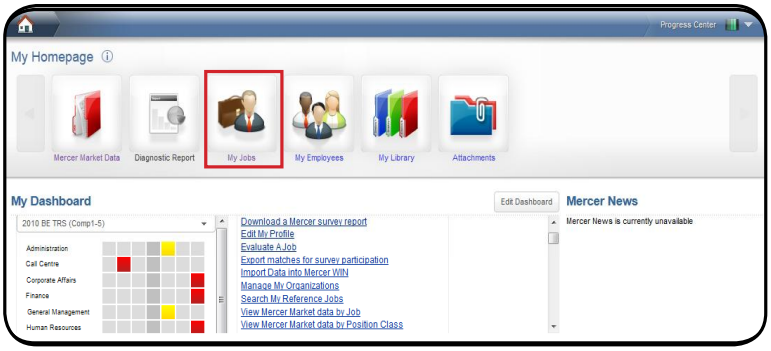


Copying Jobs

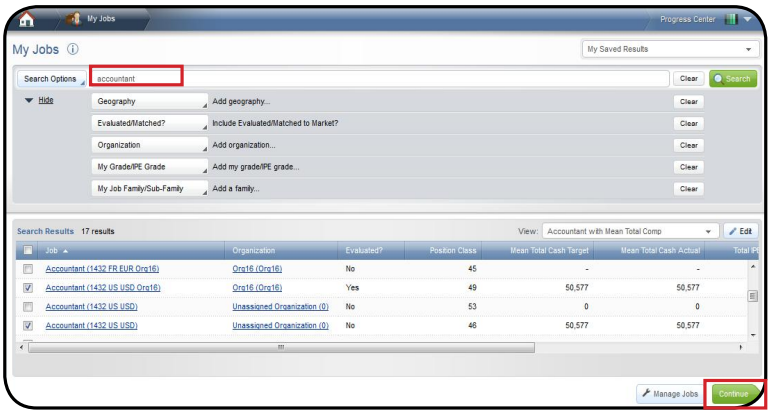
The Copy Jobs process allows you to create new copies of existing jobs to help expedite your job evaluation process. You must specify the Organization, Country, and Currency for the new job record(s). Any attachments or evaluation data on the original job will be copied along with the job information. The process will also copy the association to a reference job, if the association exists on the original job record. However, the reference job data will not be refreshed on the new job. Employees, market matches, and evaluation models will not be copied from the original job to the new Job.

You may make multiple copies of a single job, as long as the new job has a unique combination of Organization, Country, and Currency. You will be provided a report of the results of the Copy Jobs process. This report will state the number of selected jobs to be copied, the number of new jobs successfully created, and the number of unsuccessful copy attempts. The report will include the reason for each copy attempt that was unsuccessful. The Copy Jobs process will not overwrite an existing job.

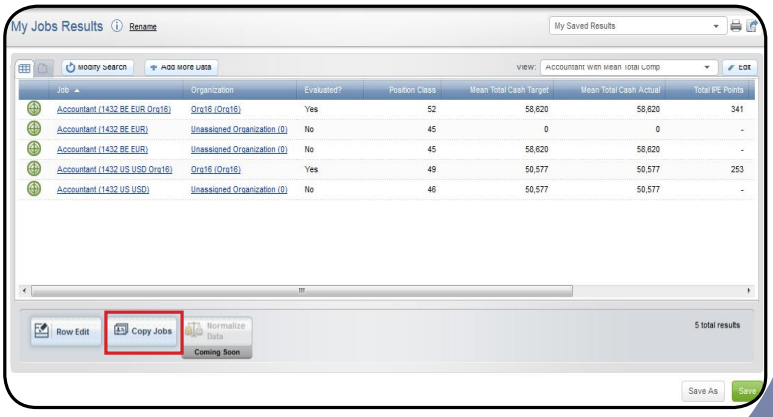
1. Click on the **My Jobs** button on the Mercer WIN Advanced eIPE homepage.



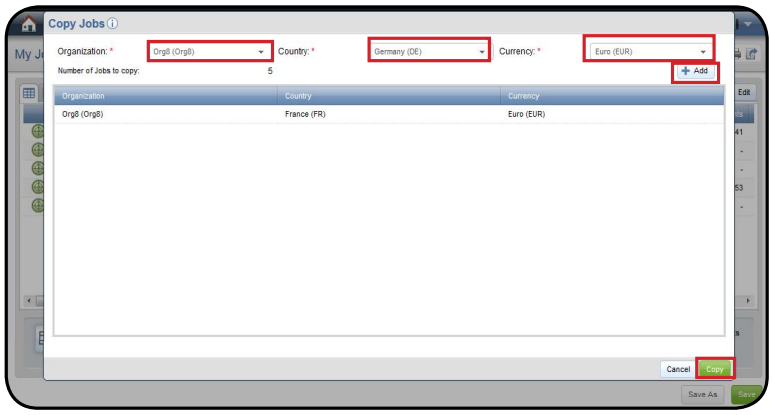
2. Enter search criteria, select the appropriate jobs from the Search Results pane and click **Continue**.



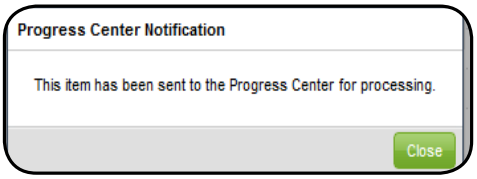
3. On the My Job Results page click **Copy Jobs**.



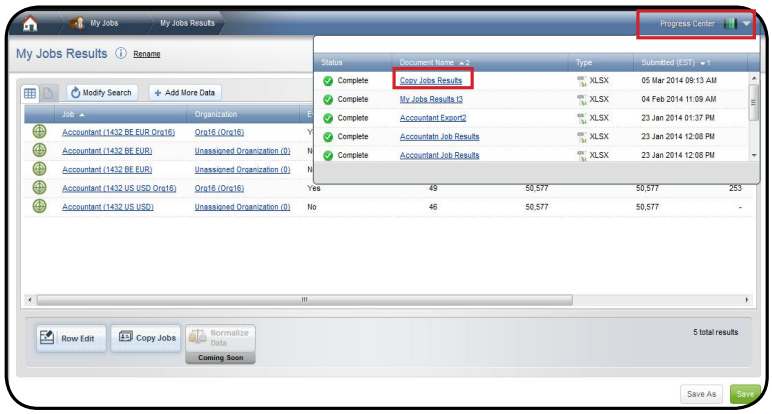
4. On the Copy Jobs page, select the **Organization** you want to copy jobs to, and specify the **Country** and **Currency** for the jobs that will be copied. Then click the **Add** button. You may repeat this process by selecting different Organizations, Countries, or Currencies and clicking the Add button again. Then click **Copy**.



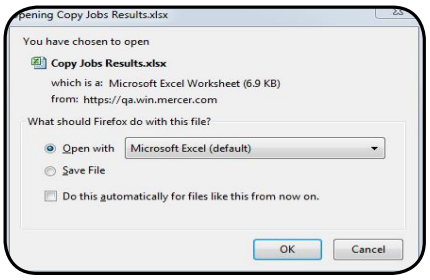
5. You will receive a notification that the item has been sent to the Progress Center for processing.



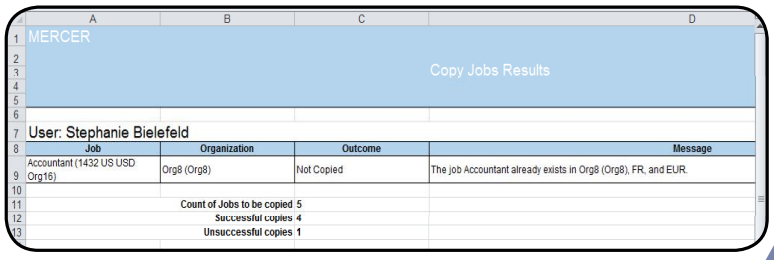
6. Click on **Progress Center** and select the Document Name for the Copy Jobs Results.



7. You will be prompted to choose whether to Open or Save the Excel file.

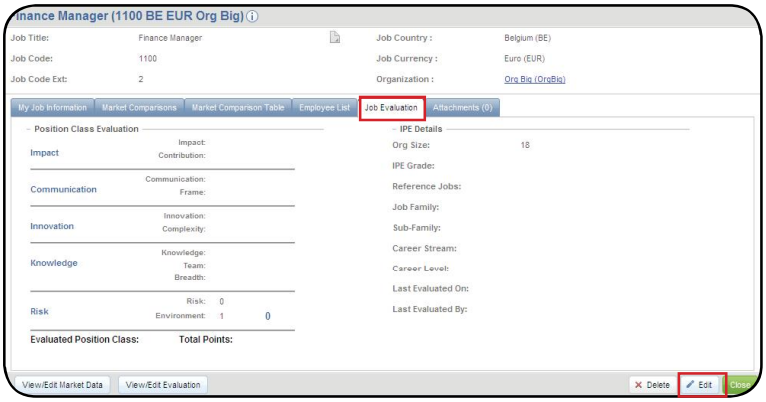


Note: The Excel file will automatically be formatted according to Excel settings. You may need to resize the columns as appropriate for your data.



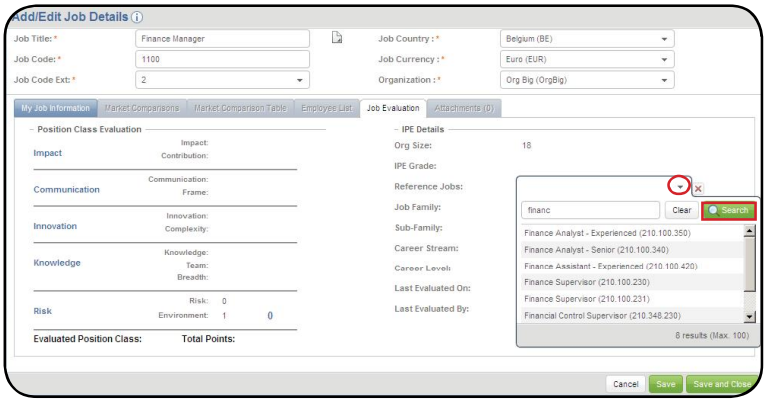
Performing a Job Evaluation by Copying Evaluation Data from a Reference Job

Rather than creating job evaluations from scratch, you can easily perform job evaluations based on the reference job data in the My Reference Job Library. Reference Jobs contain evaluations and detail on the job, which Mercer WIN Advanced will apply to your job with just a few clicks.



1. On the Job Details page, select the **Job Evaluation** tab and click the **Edit** button at the bottom of the page.

   Note: The organization must be sized in order to copy evaluation data.

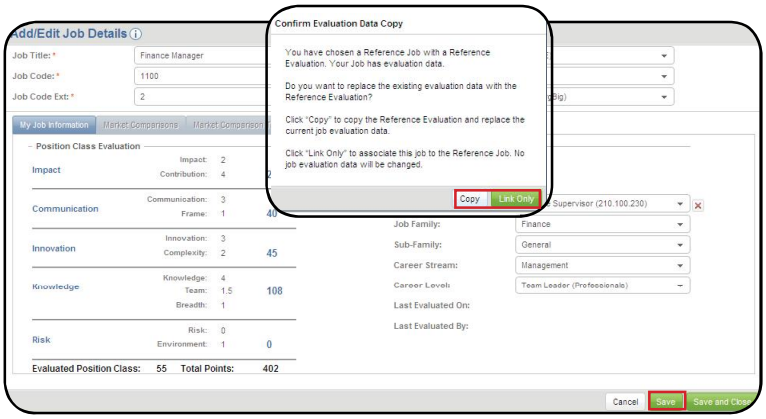


2. In the right column of the Job Evaluation tab, click the **Reference Jobs** drop-down.

3. A search panel allows you to query the My Reference Jobs Library. Enter a keyword in the text field and click **Search**.

4. Select a reference job from the results list. The Job Family, Sub-Family, Career Stream, and Career Level fields will automatically populate, as well as the Position Class Evaluation information on the left side of the page.

   *Note: If the job already has evaluation data, a pop-up will ask if you want to replace the existing evaluation data with the reference evaluation. Click **Copy** to overwrite the existing evaluation data, or **Link Only** to associate your job to the reference job but retain your existing evaluation data.*



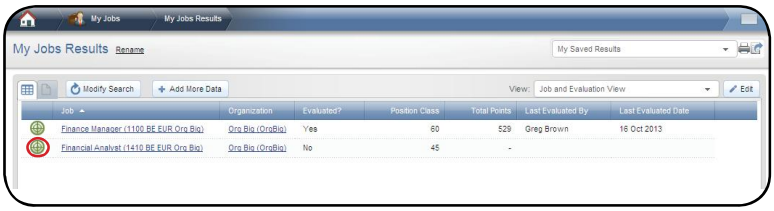
5. Click **Save**.

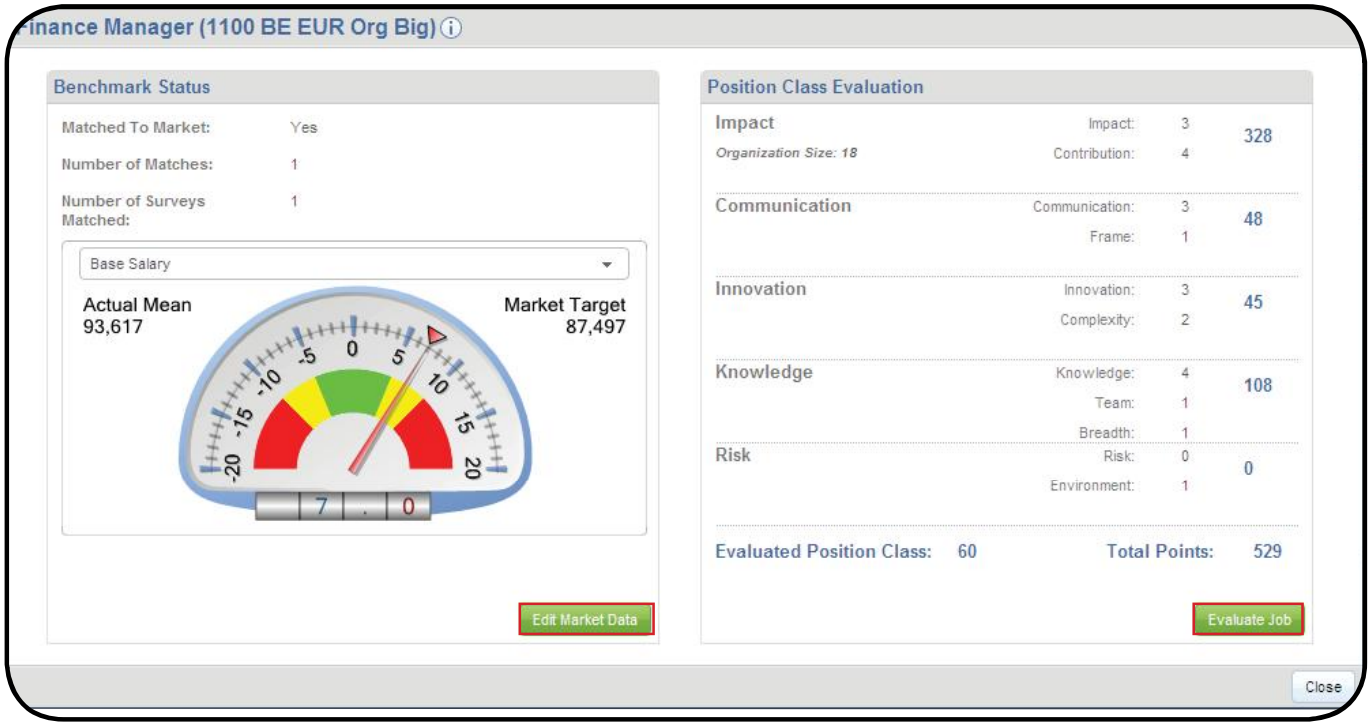
Comparing Benchmark and Evaluation Data

Once you have completed your job evaluation on a job that has also been benchmarked, you can view benchmark and evaluation data side-by-side from the My Jobs Results page.

Mercer WIN Advanced eIPE allows you to benchmark your jobs against Mercer and third party data. To see how to use this functionality please visit http://www.imercer.com/content/common/WIN/win%20promo-1.mp4 and then proceed with the following:

Click the button next to the job you wish to work with in the My Jobs Results list.



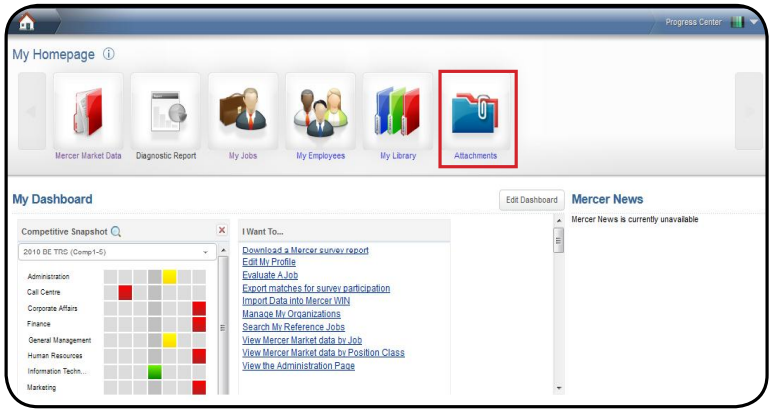


From here, you can view both Benchmarking Status and Position Class Evaluation on one page. If needed, you can either edit market data and create matches to the My Market Library, or edit evaluation data from this page by clicking the buttons at the bottom of each section.

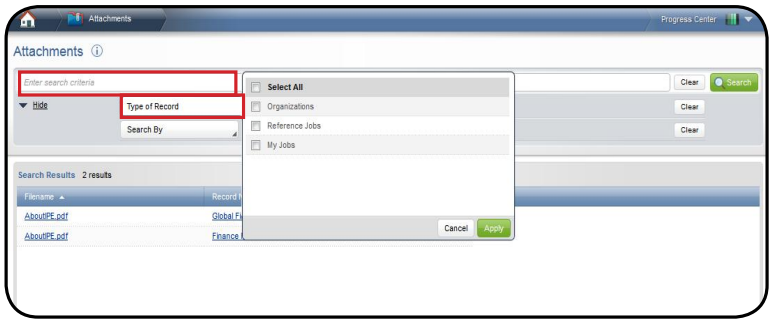
Attachment Search

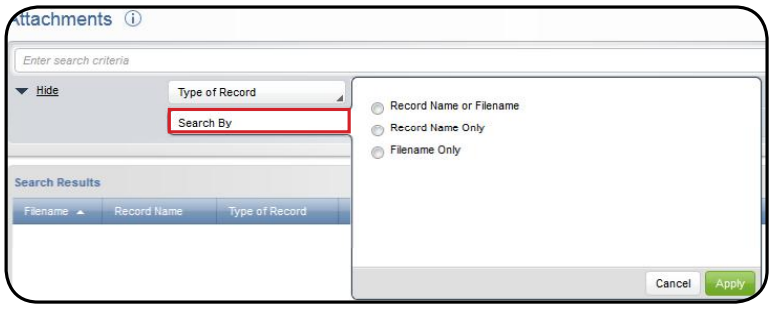
Organizations, Reference Jobs, and Jobs have the capability to store attachments. You may search across these records from the homepage of Mercer WIN Advanced eIPE to locate any attachments to which you have access.

1. Click on the **Attachments** button on the Mercer WIN Advanced eIPE homepage.



2. You will be presented with the search attachments page. You can search by name of the document or by the Type of Record to which an items is attached. The Search By option allows you to set additional limits to the search.





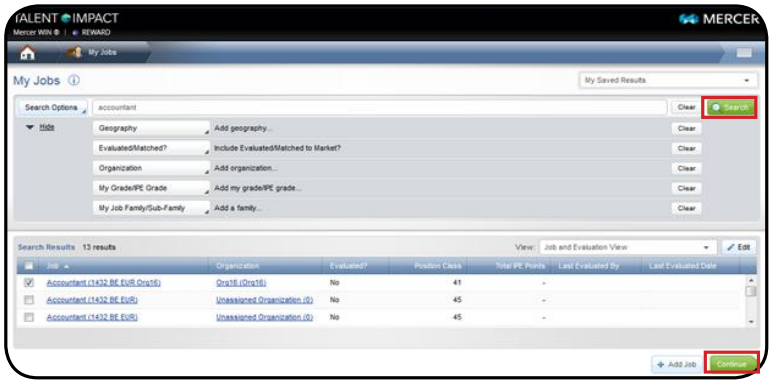
Exporting and Printing Data

While working within the Mercer WIN Advanced eIPE system, you may want to export data into spreadsheets and/or print data for use within your company.

Create an Export of My Job Data

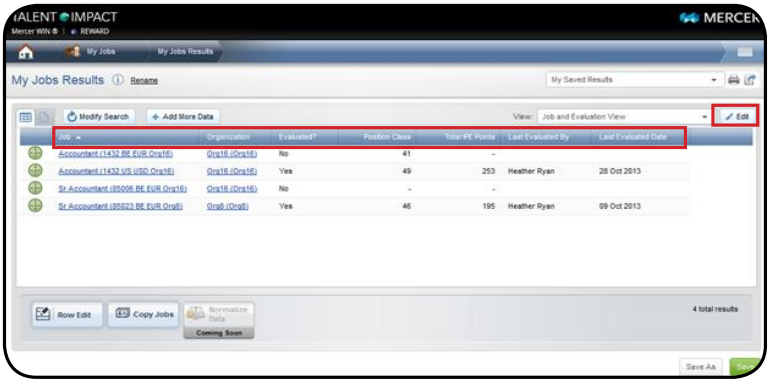
1. Click the **My Jobs** icon in the My Homepage ribbon and search for jobs that you might want to include in your export by entering a keyword in the space provided. Then click **Search**.

2. Select the jobs from the Search Results pane that should be in your export and click **Continue**.



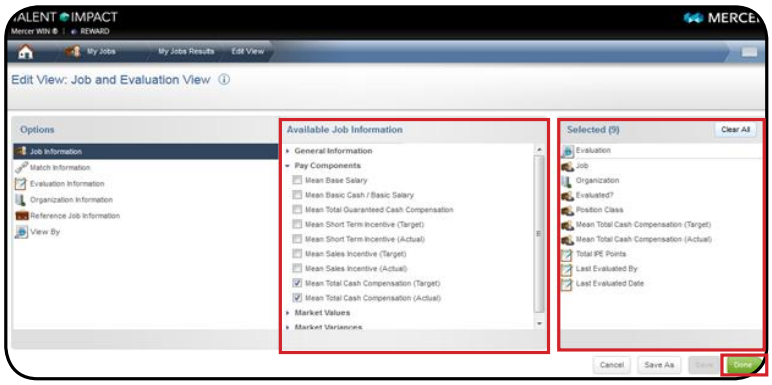
3. On the My Job Results page, review the column headers that are visible on the screen. These will be the same columns of data that will be available in your exported file.

4. If you wish to add/remove any of the data elements, click the **Edit** button in the top right portion of the page.



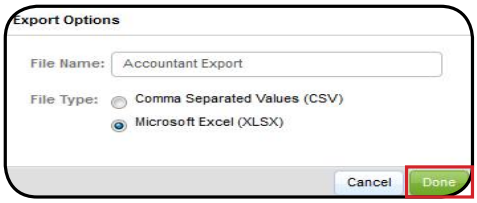
   a. On the Edit View page, you will have many options for data elements that can be included in your export. Select all desired data elements in the Available Job Information pane and sort them in relevant order in the Selected pane.

   b. When the columns you wish to include are listed in desired order, click **Done** and when prompted, give your view a name. By saving this view, you are able to come back to it in the future with any search results and use the same format again and again.

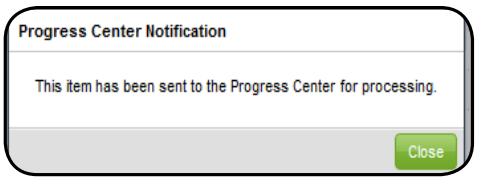


5. On the My Job Results page, click the **Export** icon in the upper right corner of the screen.

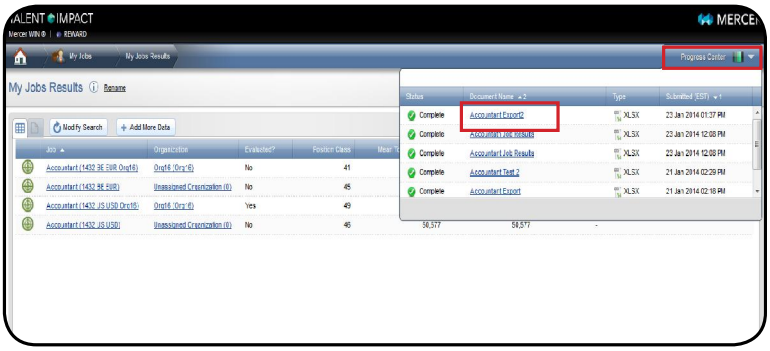
6. You will be prompted to name the file and specify the file type. Then click **Done**.



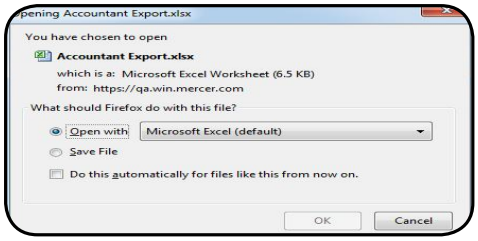
7. You will receive a notification that the export has been sent to the Progress Center for processing.



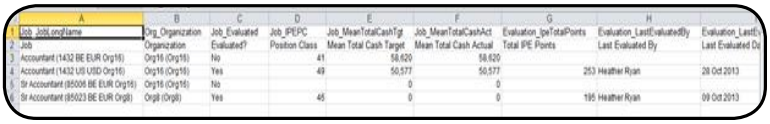
8. Click on **Progress Center** in the top right corner of the My Job Results page and click on the Document Name of the export that you wish to work with.



9. You will be prompted to choose whether to Open or Save the Excel file.



Note: The Excel file will automatically be formatted according to Excel settings. You may need to resize the columns as appropriate for your data.



Print My Job Data

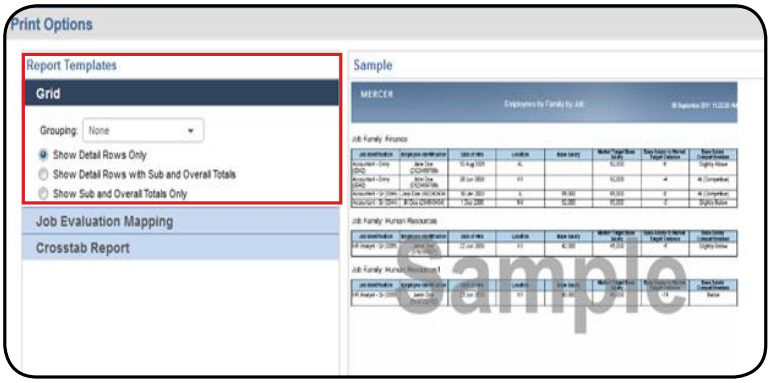
To print My Job data from Mercer WIN Advanced eIPE, complete steps 1-4 of the Create an Export of My Job Data section, and then continue with the following steps:

5. On the My Job Results screen, click the **Print** icon in the upper right corner of the screen.

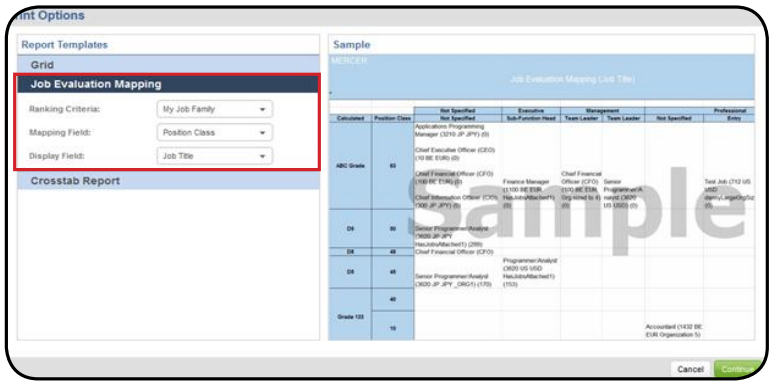
6. The Report Template list on the Print Options pop-up screen shows the template format options.

   NOTE: Depending on the type of View you start from on the results screen, the Report Template options may vary. If you are in a Job View you will only see the Grid Template option. To access the Job Evaluation Mapping report (a matrix report) you must use a Job and Evaluation View as the starting point.

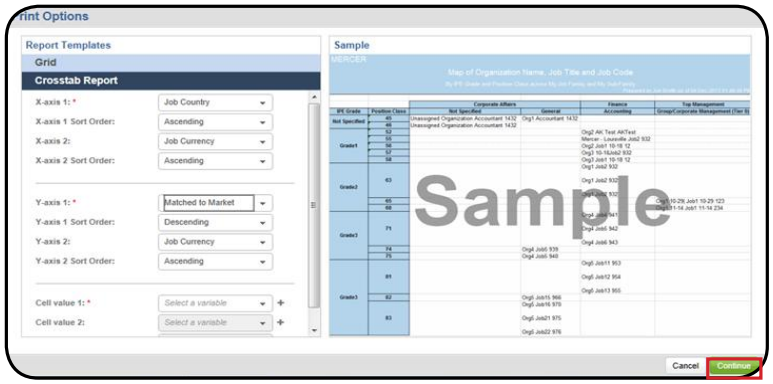
   The *Grid* template provides a list style report of your data based on the results and view columns. You have three options on how the data will be displayed.



   The *Job Evaluation Mapping* template provides a matrix style report and several options for configuration.

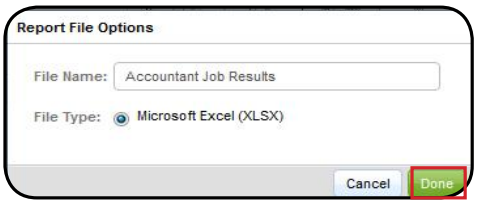


   The *Crosstab Report* provides a matrix style report with all possible data configurations. To create the possible options for reporting, you will need to set those fields on the view from which you generate the cross tab report.

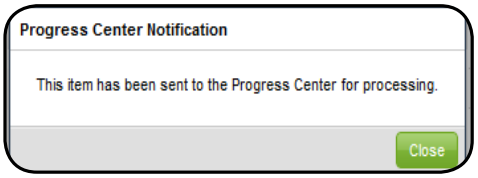


7. When you have selected the appropriate report style, click **Continue**.

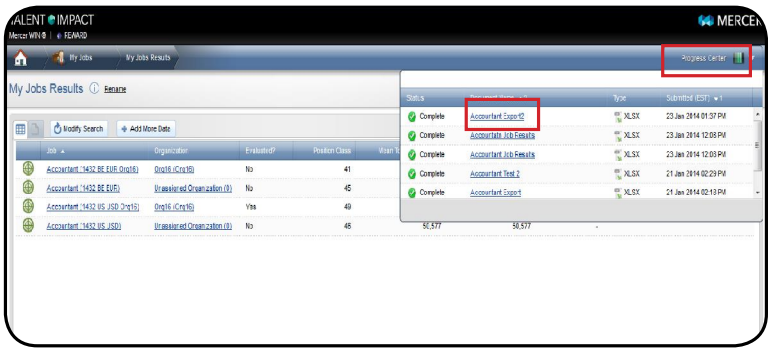
8. Enter a name for the report, then click **Done**.



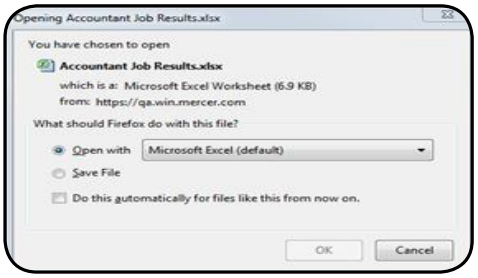
9. You will receive a notification that the report has been sent to the Progress Center for processing.



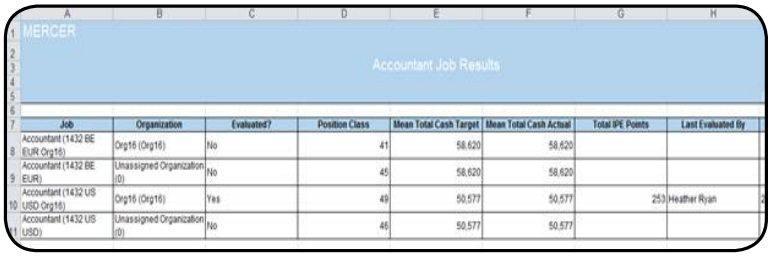
10. Click on **Progress Center** in the top right corner of the My Job Results page and click on the Document Name of the report you wish to work with.



11. You will be prompted to choose whether to Open or Save the Excel file.



Note: The Excel file will automatically be formatted according to Excel settings. You may need to resize the columns as appropriate for your data.



Job	Organization	Evaluated?	Position Class	Mean Total Cash Target	Mean Total Cash Actual	Total IPE Points	Last Evaluated By
Accountant (1432 BE EUR Org16)	Org16 (Org16)	No	41	58,620	58,620		
Accountant (1432 BE EUR)	Unassigned Organization (0)	No	45	58,620	58,620		
Accountant (1432 US USD Org16)	Org16 (Org16)	Yes	49	50,577	50,577	253	Heather Ryan
Accountant (1432 US USD)	Unassigned Organization (0)	No	46	50,577	50,577		