

IBM® Kenexa® CompAnalyst® on Cloud

Job Matching Guide

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Edition Notice

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Chapter 1: Introduction

Topics:

- Overview
- About this guide
- Document Conventions
- More information about CompAnalyst
- System recommendations

Overview

CompAnalyst lets you eliminate risk, reduce costs, and increase your efficiency through its leading on-demand market pricing and pay analytics capabilities contained in one integrated system. Designed by Certified Compensation Professionals, CompAnalyst combines the intelligence you need with the productivity you want — all in a single, Web-based system.

You can combine CompAnalyst's flexible, on-demand modules to:

- Automate your market-pricing processes using your third party compensation surveys or Kenexa.com's single source of employer-reported data.
- Seamlessly develop market prices using your own third party compensation surveys by centralizing survey data in a shared, online repository.
- Simplify cumbersome survey participation processes.
- Quickly assess pay program competitiveness and internal equity, and combine data on employees, jobs, salary structures and market prices into a single report.
- Easily analyze and model internal pay structures against market rates and evaluate various cost scenarios.
- Model the cost of performance-based merit increase programs with ease.

CompAnalyst also provides a setup module for user, tasks, and GUI management. Using CompAnalyst is like having a compensation consultant dedicated exclusively to your organization.

About this guide

This guide describes how to use the CompAnalyst job matching functionality to match your company jobs to survey jobs. This guide is intended for compensation analysts and anyone who wants to know how to match company jobs to survey jobs.

This guide contains the following chapters.

Chapter 1: Overview

Provides a high-level overview of CompAnalyst and job matching. Also describes the contents of this guide; document conventions; and additional sources of information about the CompAnalyst application.

Chapter 2: Matching single jobs

Describes how to match single company jobs to survey jobs.

Chapter 3: Managing match priority

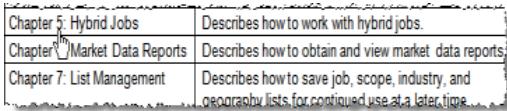
Describes how to use group and set survey job matches in relation to company jobs and to each other.

Index

Provide an index of topics in this guide.

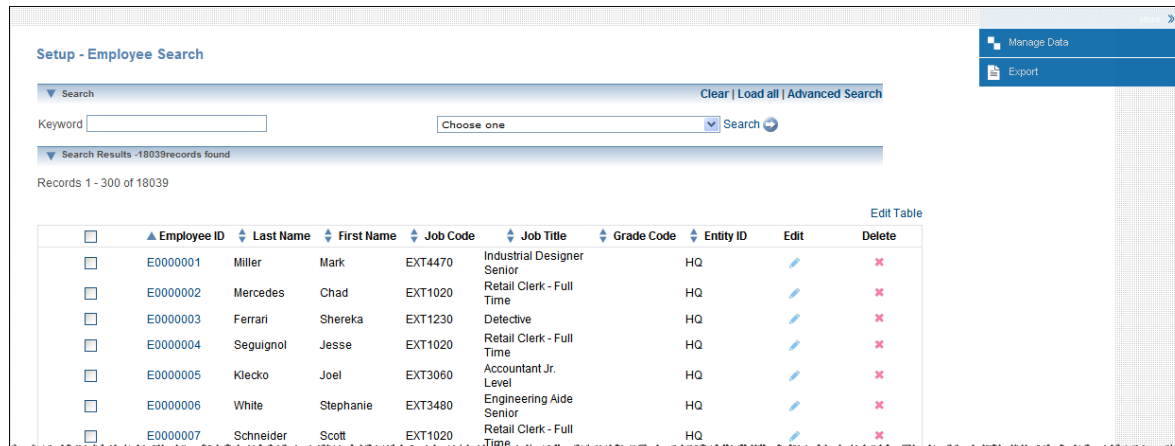
Document conventions

This guide uses the following document conventions.


Item	Convention	Example
Book titles	Title capitalization in italic.	<i>CompAnalyst User's Guide</i>
Chapter titles	Title capitalization in quotation marks.	See "Chapter 6: Market Data Reports."
Commands on menus and buttons	Bold in procedures with capitalization following that of the user interface.	Press Submit .
Emphasis	Bold	Do not press this button.
Linked text	Body text. Hand icon appears when Shift key is pressed on the text. Used in the Table of Contents, and chapter and topic references and cross-references.	

Sample data

This guide uses fictitious employee and user information in sample screens for example purposes only. The information does not reflect actual data.



	Employee ID	Last Name	First Name	Job Code	Job Title	Grade Code	Entity ID	Edit	Delete
<input type="checkbox"/>	E0000001	Miller	Mark	EXT4470	Industrial Designer Senior	HQ	HQ		
<input type="checkbox"/>	E0000002	Mercedes	Chad	EXT1020	Retail Clerk - Full Time	HQ	HQ		
<input type="checkbox"/>	E0000003	Ferrari	Shereka	EXT1230	Detective	HQ	HQ		
<input type="checkbox"/>	E0000004	Seguignol	Jesse	EXT1020	Retail Clerk - Full Time	HQ	HQ		
<input type="checkbox"/>	E0000005	Klecko	Joel	EXT3060	Accountant Jr. Level	HQ	HQ		
<input type="checkbox"/>	E0000006	White	Stephanie	EXT3480	Engineering Aide Senior	HQ	HQ		
<input type="checkbox"/>	E0000007	Schneider	Scott	EXT1020	Retail Clerk - Full Time	HQ	HQ		

 Depending on the user interface theme selected to display CompAnalyst, the screens you see on your computer may appear different from the sample screens shown in this guide.

More information about CompAnalyst

The following table lists additional sources of information about CompAnalyst.

User's Guide	Description
<i>Market Data</i>	Describes how to access and use CompAnalyst market data to perform compensation-related tasks such as job pricing, job benchmarking, and data analysis.
<i>Market Pricing</i>	Describes how to use the Market Pricing tool to create market composites out of select, third-party data sources.

User's Guide	Description
<i>Survey Participation</i>	Describes how to create and view survey participation reports; match survey jobs to company jobs manually or import a group of matches through a tab-delimited text file; access new updated job matches from the composite builder and Survey Library; and export your survey participation reports to several output formats.
<i>Salary Structures</i>	Describes how to analyze, manage, and model your organization's pay structures.
<i>Salary Planning</i>	Describes how to model the cost of performance-based merit increase programs.
<i>Reporting Analysis</i>	Describes how to create pay analytics of your company's employees and jobs in comparison with market data using standard and custom reports.
<i>Company Data Management</i>	Serves as an introduction to creating and setting up your company's information in CompAnalyst.

Chapter 2: Matching single jobs

Topics:

- Accessing job matching functionality
- Matching jobs
- Importing job matches
- Exporting job matches

Accessing job matching functionality

You can access CompAnalyst job matching functionality by clicking **Market Pricing** in the main menu, and then selecting **Job Matches - Single**. The job matching screen has three primary areas:

- **My Company Jobs** displays your company jobs for the job family selected using the drop-down menu.
- **My Survey Jobs** displays the survey jobs for the survey you selected using the drop-down menus.
- **My Matched Jobs** displays those jobs you've already matched for the selected company jobs and surveys. You can also delete a match in this area.

Note that through the Manage Matches menu, you can import or export job matches, or manage match priority by selecting the appropriate menu item.

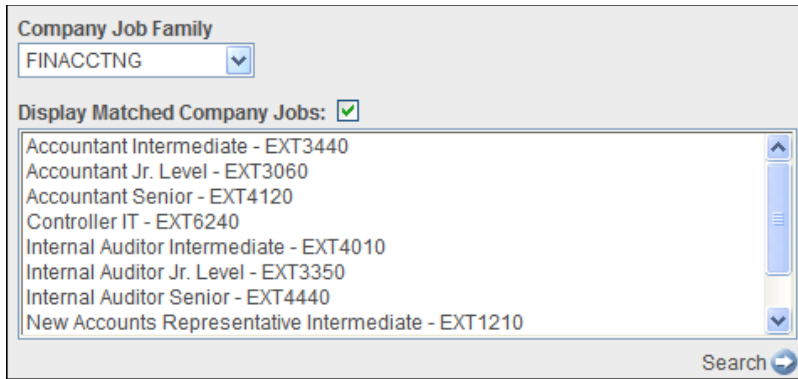
Matching jobs

To begin job matching for single jobs:

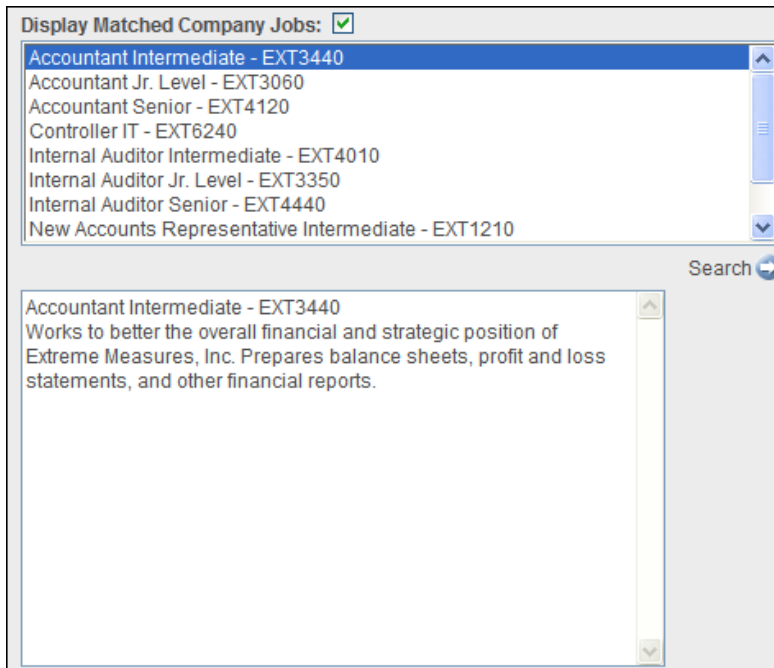
1. On the main menu, click **Market Pricing**, and then select **Job Matches Single**. The Job Matches page opens.

The screenshot shows the 'Job Matches' interface. At the top left, the title 'Job Matches' is displayed. Below it, there are three main sections: 'My Company Jobs', 'My Survey Jobs', and 'My Matched Jobs'. The 'My Company Jobs' section includes a 'Company Job Family' dropdown menu and a 'Display Matched Company Jobs' checkbox. The 'My Survey Jobs' section includes dropdown menus for 'Survey Vendor', 'Survey Title', 'Survey Job Family', and 'Level', along with a 'Display Matched Survey Jobs' checkbox. Below these are two search boxes with 'Search' buttons. The 'My Matched Jobs' section is a large empty box with a 'Delete' button. A legend on the right shows a percentage match icon, an 'Adjustment' icon, and a 'Match' icon.

2. In the My Company Jobs area, select a job family from the **Company Job Family** drop-down menu. The My Company Jobs list shows the jobs for the selected job family, for example:



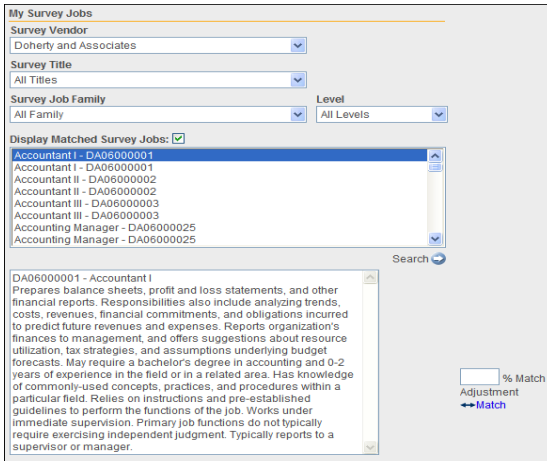
- Check the **Display Matched Company Jobs** box to list previously matched company jobs in the Company Jobs list.
 - Uncheck the **Display Matched Company Jobs** box to remove previously matched company jobs from the Company Jobs list.
3. Click a job in the 'My Company Jobs' list to select it. The job description appears in the window below the jobs list. You can also search for a job by clicking **Search** to open the Search Company Jobs page in a new browser window.




Tip: You can select multiple jobs simultaneously by pressing the **Ctrl** key when selecting job titles. The job descriptions are separated by a single dashed line.

4. To select survey information, use the drop-down menus in the My Survey Jobs area. The menus allow you to select a survey vendor, title, job family, and level. The My Survey Jobs list repopulates with a list of jobs meeting the criteria.

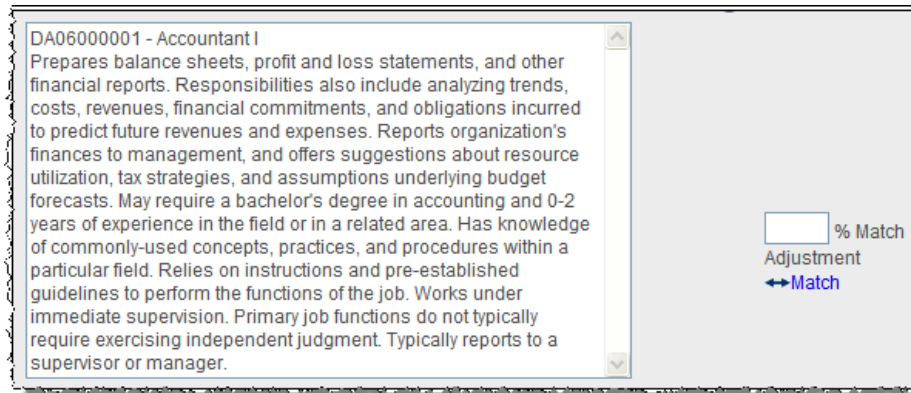
Job Matching Guide



5. Click a job in the My Survey Jobs list to select it. You can also search for a job by clicking **Search** to open the Search Company Jobs page.

 You can match a single company job to several survey jobs; several company jobs to a single survey job; or several company jobs to several survey jobs.

6. Enter a Match Percentage in the % Match Adjustment box on the right side of the page (optional) and click **Match**.



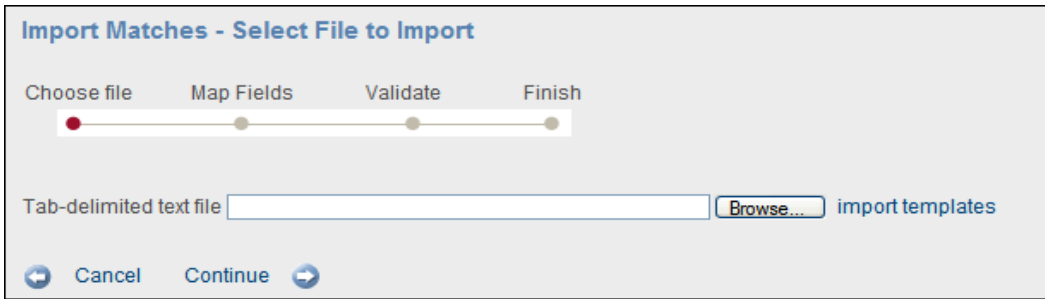
7. The match then appears in the My Matched Jobs area at the bottom of the page.



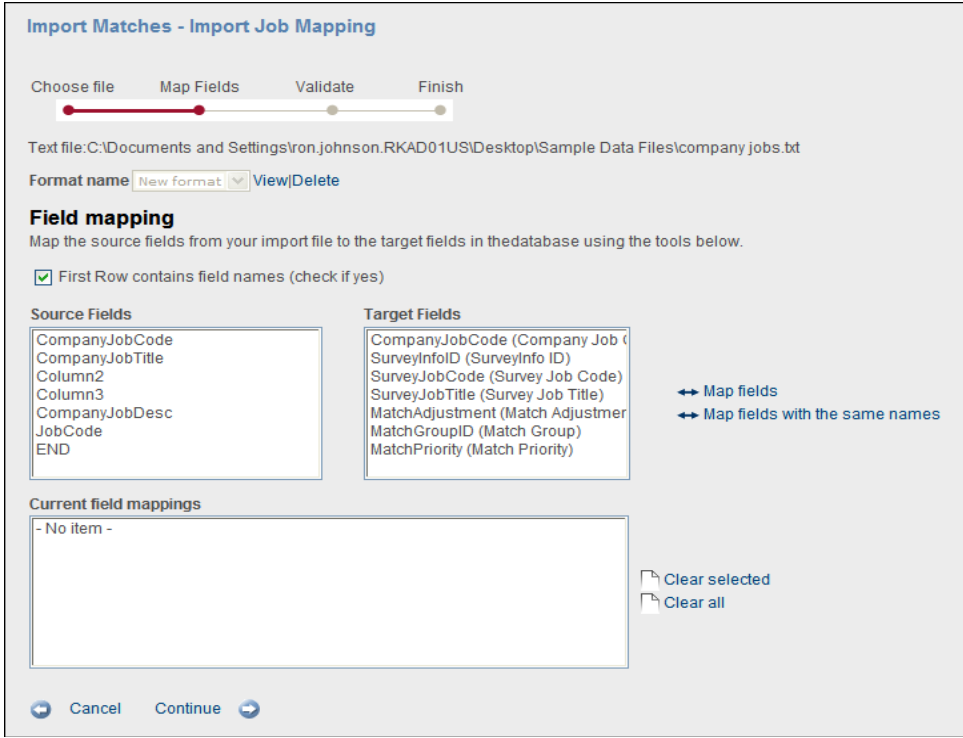
Importing job matches


To import job matches:

1. In the Manage Matches menu on the Job Matches page, click **Import Matches**. The Import Matches – Select File to Import page displays.

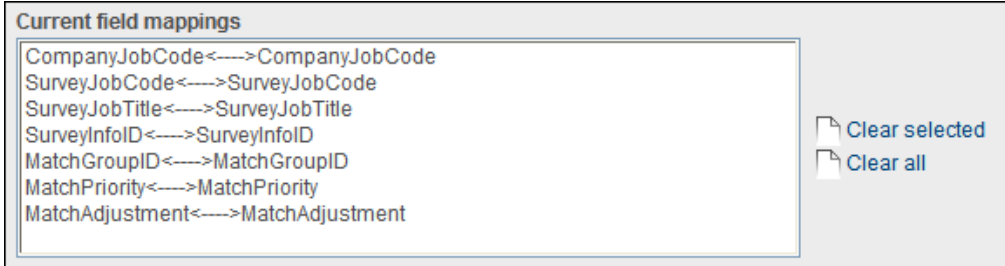


- 2. Click **Browse...** and navigate to the tab-delimited file containing the job matches you want to import into CompAnalyst.
- 3. Click **Continue**. The Import Matches – Import Job Mapping page opens.



 Check the **First Row contains field names (check if yes)** box if you know which first row heading belongs to which fields (although the heading may also be the first line of data), or if the first row contains field names.

- 4. Map the fields from the tab-delimited file to the job fields that exist in CompAnalyst by clicking the field name in the Source Fields column, and then selecting the corresponding field in the Target Fields column.
- 5. Click **Map fields**. Mapped fields appear in the “Current field mappings” box.



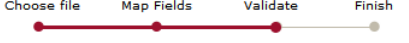
If you know your field names are correct and matched to the CompAnalyst field names, you can click **Map fields with the same names** to map all the matched fields at once.

Tip To clear a field mapping, select the mapping to be cleared and click **Clear selected**. To clear all current mappings click **Clear all**.

- Click **Continue**. CompAnalyst validates the data and the Import Matches – Import Job Mapping Validation page opens. Note that you can minimize your browser while the file is being validated, but do not close the browser or you will have to start the import process again.

Import Matches - Import Job Mapping Validation

Choose file Map Fields Validate Finish



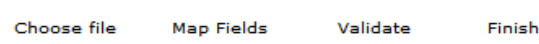
Edit Invalid records and/or click continue button to upload validated records, You will receive an email confirmation once the data has been successfully imported.

Valid rows	4
Invalid rows	0

- View the validation summary to see how many rows of data are valid or invalid for import. Invalid rows of data appear with the reason for the exception. You may edit them within CompAnalyst, or edit the source file and begin the import process again.
- Click **Continue** to proceed with the data import process. The Import Job Mapping Confirm page opens.

Import JobMapping Confirm

Choose file Map Fields Validate Finish



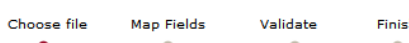
Import file name	C:\Documents and Settings\ron.johnson\Desktop\company jobs.txt
Successfully imported	12 Download Successfully Imported Data
Failed to import	0
Save import format	<input type="checkbox"/>

On this page, choose whether you want to:

- Download the imported job data to a Microsoft Excel file
 - Save the import format
- Click **Continue** to finish the import process. CompAnalyst maintains a history of all the jobs you import on the Import Matches – Select File to Import page.

Import Matches - Select File to Import

Choose file Map Fields Validate Finish



Tab-delimited text file [import templates](#)

Import History						
User ID	Session Import ID	Importfile	Import Start Time	Number of Rows	Rows Imported	Status
Ron Johnson	C919192728_14917_BU	company jobs.txt	2/8/2011 6:32:03 PM	4	12	Completed

Correcting data import errors

If the file you are importing contains one or more invalid rows of data, CompAnalyst lists them with the reason for the exception (for example, invalid company job title) in a table at the bottom of the page.

Import Matches - Import Job Mapping Validation

Choose file Map Fields Validate Finish

Edit Invalid records and/or click continue button to upload validated records, You will receive an email confirmation once the data has been successfully imported. To view or download invalid records click on the "Download invalid data" link.

Valid rows 3
 Invalid rows 1 [Download invalid data](#)

Invalid records							
Company Job Code	SurveyInfo ID	Survey Job Code	Survey Job Title	Match Adjustment	Invalid Reason	Adjust	Delete
	RGS		Test Regression Survey Job title		Invalid CompanyJobCode		

At this point, you can choose to edit the invalid row(s) of data in CompAnalyst, or in the source data file. Optionally, you can delete the invalid row of data by clicking the icon in the Delete column.

To edit the invalid row data in the source data file:

1. Click **Download invalid data**, and choose whether you want to open the Microsoft Excel file immediately, or save it to your computer to edit later.
2. Correct the invalid data as needed, and save the file when you are finished.

To edit the invalid row of data in CompAnalyst:

1. Click the icon in the Adjust column. The "Import Job Mapping – Edit invalid record" page opens.

Import Job Mapping - Edit invalid record

Validation problem: **Invalid CompanyJobCode**

Source information

Company Job Code

Survey

Survey Job Code

Survey Job Title

2. Correct the invalid data as needed, and then click Save to return to the Import Matches – Import Job Mapping Validation page. Note that the page no longer shows an invalid row(s).

Import Matches - Import Job Mapping Validation

Choose file Map Fields Validate Finish

Edit Invalid records and/or click continue button to upload validated records, You will receive an email confirmation once the data has been successfully imported.

Valid rows 4
 Invalid rows 0

3. Click **Continue** to proceed with the validation process. (You can exit the screen while the import is in progress and CompAnalyst will notify you by email when the import process finishes.) A successful validation opens the Import Currency - Confirm page.

Import JobMapping Confirm

Choose file Map Fields Validate Finish

Import file name	C:\Documents and Settings\ron.johnson\Desktop\company jobs all.txt
Successfully imported	4 Download Successfully Imported Data
Failed to import	0
Save import format	<input type="checkbox"/>

On this page, choose whether you want to:

- Download the imported job data to a Microsoft Excel file.
 - Save the import format.
4. Click **Continue to complete the import process.**
 5. Optionally, you can click **Save import format** to save the format for future use.

Exporting job matches

After you have matched your jobs, you can export them to Microsoft Excel for additional data manipulation. These are the job matches that appear in the My Matched Jobs list box on the Job Matches page.

1. In the Manage Matches menu, click **Export**. An “export in progress” window opens.
2. When the export finishes processing, in the File Download dialog, choose whether you want to open the Excel file for immediate viewing, or save it to your computer.

	A	B	C	D	E	F	G	H	I	
	CompanyJobCode	CompanyJobTitle	SurveyJobCode	SurveyJobTitle	SurveyCode	SurveyDesc	SurveyInfoID	SurveyCompanyName	SurveyDataDate	Matc
2	EXT3440	Accountant Intermediate	DA06000001	Accountant I	DAPRO	Professional & Management	DAPRO01012009	Doherty & Associates	01/01/2009	38
3	EXT3440	Accountant Intermediate	DA06000002	Accountant II	DAPRO	Professional & Management	DAPRO01012009	Doherty & Associates	01/01/2009	86
4	EXT3060	Accountant Jr. Level	DA06000001	Accountant I	DAICOMP	International Professional & Management	DAICOMP01012009	Doherty & Associates	01/01/2009	168
5	EXT3060	Accountant Jr. Level	DA06000001	Accountant I	DAPRO	Professional & Management	DAPRO01012009	Doherty & Associates	01/01/2009	31

Chapter 3: Managing match priority

Topics:

- Managing single job matches
- Using the survey job tool

Managing single job matches

The Manage Match Priority page lets you graphically group and set survey job matches in relation to company jobs and to each other.

To manage job matches:

1. Click **Manage Match Priority** in the Manage Matches menu on the Job Matches page. The Manage Match Priority page opens.

The screenshot shows the 'Manage Match Priority' page. At the top, there is a title and a brief instruction: 'Select your Company Job. Manage the hierarchy of your survey job matches in relation to your company job and each other by arranging the matches. Matches in Level 1 are independent of each other, while corresponding matches in other levels are alternatives to the match in Level 1.' Below this, there is a section titled 'My Company Jobs' with a dropdown menu that currently says 'Please select a Job' and a 'Select Job' button. Underneath, there is a 'View Description' link. The 'My Matched Jobs' section is currently empty, with an 'Add Match Group' button and three placeholder boxes labeled 'Match Group 1', 'Match Group 2', and 'Match Group 3'. A 'Save' button is located at the bottom left.

2. Select a job from the **My Company Jobs** drop-down menu, and then click **Select Job**.

This screenshot shows the 'Manage Match Priority' page after a job has been selected. The 'My Company Jobs' dropdown menu now displays 'Accountant Jr. Level (EXT3060)'. The 'Select Job' button is still present. The 'My Matched Jobs' section remains empty, with the 'Add Match Group' button and placeholder boxes still visible.

The page reloads with the match boxes displaying the survey jobs to which the company job is matched.

This screenshot shows the 'Manage Match Priority' page after it has reloaded. The 'My Matched Jobs' section is now populated with seven match groups, each containing a survey job title, company name, and a '% Match Adjustment' input field. The match groups are:

- Match Group 1:** Forte Consulting /Benchmark Survey, FC0600001, Accountant I
- Match Group 2:** Doherty and Associates /Professional, DA0600001, Accountant I
- Match Group 3:** Forte Consulting /Finance & Accounting, FC0600001, Accountant I
- Match Group 4:** IPAS /IPAS - Global High-Tech Survey - United Kingdom, FAP1, General & Cost Accounting - Entry
- Match Group 5:** IPAS /IPAS - Global High-Tech Survey - Japan, FAP1, General & Cost Accounting - Entry
- Match Group 6:** Lensing & Associates /Benchmark, LA0600001, Accountant I
- Match Group 7:** Lensing & Associates /International Benchmark, LA0600001, Accountant I

The 'Add Match Group' button is still visible at the top right of the 'My Matched Jobs' section.

- To group the matches, click and drag the match box from one match group to another. Matches in Match Group 1 are independent of each other, while matches in other levels are alternatives to the matches in Match Group 1.

The match box contains the survey vendor, survey title, survey job code, and survey job title. You can also enter a match adjustment in the **% Match Adjustment** text field.

Match Group 4

IPAS /IPAS - Global High-Tech Survey -
United Kingdom
FAP1
General & Cost Accounting - Entry

% Match Adjustment 60

- In the match box, click the survey job code or job title to open a pop-up window that contains additional information about the survey job.

View Survey Job

Survey Job Code	FAP1
Survey Job Title	General & Cost Accounting - Entry
Survey Effective Date	1/1/2008
Survey Job Description	Responsible for maintaining accounts and records in various general and/or cost accounting functions. Collects and analyzes financial data and prepares reports and recommendations. Reviews, verifies and approves transactions and journal entries. Prepares income and balance sheet, profit and loss, consolidated and other accounting statements. May design, modify, install and/or maintain general accounting systems. Typical Title: Entry Summary/Examples: Associate Programmer/Analyst, Jr. Accountant, Paralegal Decision Making/Execution: Works on projects of limited complexity or with accounts in a support role. Emphasis is on learning the key aspects of the job to be performed. Accountability/Org Impact: Incumbents are closely managed by more senior staff members. Work is reviewed regularly by supervisor or more senior peers. Complexity/Skills/Experience: Knowledge base generally acquired from a college degree or equivalent course training. Typically 0-2 years experience.

- Delete matched survey jobs by clicking the delete icon in the top-right corner of the match box.
- Optionally, you can add more match group levels by clicking **Add Match Group** on the right side of the page.
- Click **Save** to save the job match information. When you click Save, empty match group levels are removed.
- Return to the Job Matches page by clicking **Return to Job Matches** in the **Manage Matches** menu.

Using the survey job tool

The survey job tool lets you find survey jobs to match to company jobs while in the Manage Match Priority page. When you have found the survey job you would like to match to your company job, you can add it to a match group.

To use the survey job tool:

- On the Manage Match Priority page, select a company job in the My Company Jobs drop-down menu, and then click **Select Job**. The page refreshes to show the matches for your selection.
- In the Manage Matches menu, select **View/Hide survey job tool**. The My Survey Jobs pop-up window opens.
- Use the drop-down menus to find the desired survey and survey job. The matches are displayed in the results window. Optionally, choose to display matched survey jobs by checking the box.
- Click the desired job to select it and a job match box appears. You can now drag and drop the match box into a match group for a selected company job.

My Survey Jobs

Survey Vendor
-Select a Vendor-

Survey Title
All Titles

Survey Job Family
-Select a Family-

Level
-Select a Level-

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