

**United States Department of Defense (DoD)**  
**Acquisition Workforce Demonstration Project (AcqDemo)**  
**Contribution-based Compensation and Appraisal System Software**  
**(CAS2Net)**



Developed under Contract OPM1912C0033

U.S. OFFICE OF PERSONNEL MANAGEMENT  
Training and Management Assistance Branch

Project Code: B80BTBWZ and 264014VPD312002

**SUB-PANEL SPREADSHEET GUIDE (SUB-PANELUG)**

Version 2014  
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Prepared for:

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Acquisition Workforce Demonstration Project (AcqDemo)



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# ACQDEMO Sub-Panel Spreadsheet (2014) Description

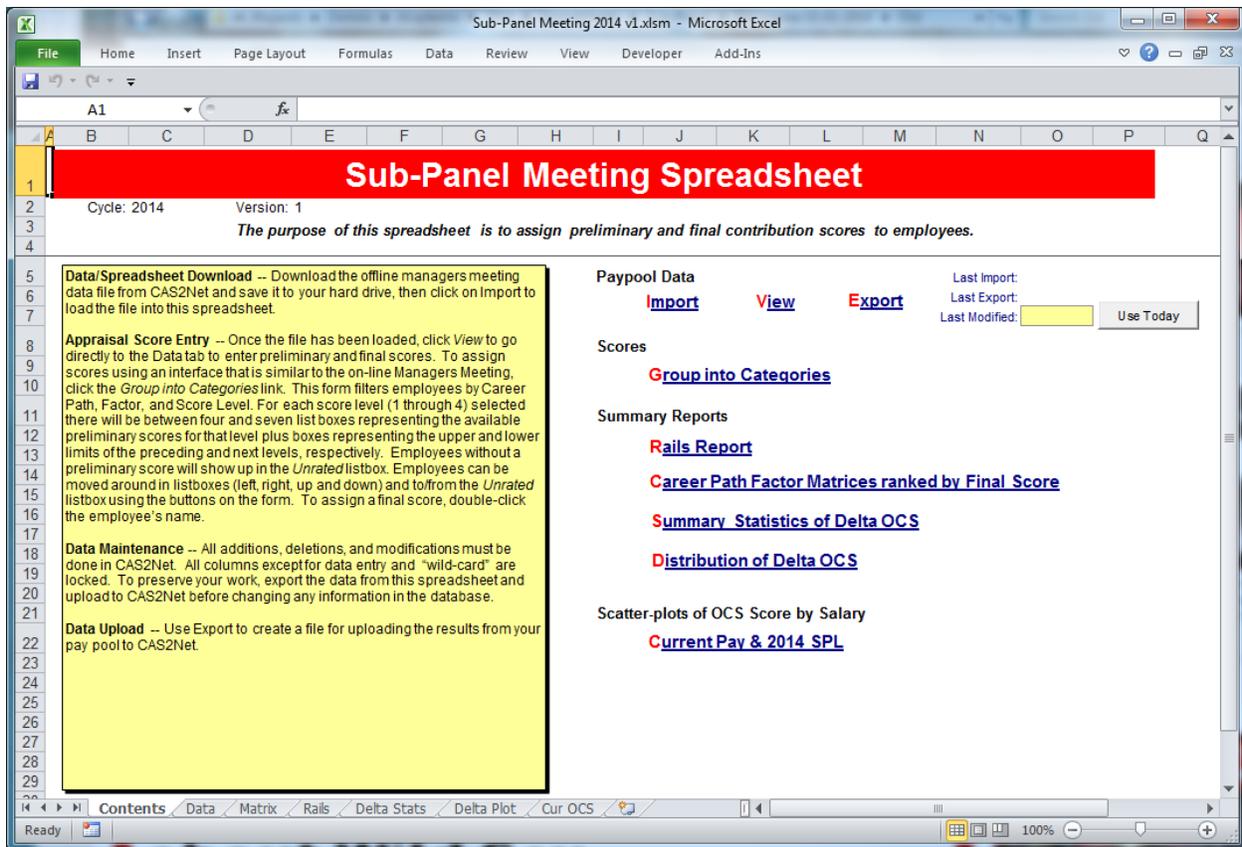
October 2014

The spreadsheet is a Microsoft Excel workbook called *Sub-Panel Meeting 2014 v1.xlsm* consisting of seven tabbed worksheets. The workbook may be downloaded from the Pay Pool Notices section of CAS2Net located at <https://acqdemoii.army.mil/cac/cas2net>. The workbook initially comes “empty” and must be populated with data by importing a file. CAS2Net, a database application written in Oracle, creates the import files. ***Any time a file is imported into the workbook, all existing data are cleared and replaced with data from the imported file.*** The five tabbed worksheets are described in this document in the order in which they appear along the bottom of the workbook.

	<u>Page</u>
Contents .....	2
Data .....	5
Assigning Scores on the Data Sheet.....	9
Data Sheet Column Descriptions.....	11
Matrix .....	16
Rails Report .....	17
Delta Statistics.....	18
Current OCS Scatter Plot .....	20
Group into Categories.....	23

## Contents

This worksheet, shown below, is the first sheet you will see after you open the workbook and activate the macros. It provides a brief description of the workbook, its purpose, and contents. The right side of the sheet helps you import and export files and navigate around the workbook. The cycle year is displayed in the upper left corner just below the red title bar. The date and time of the last import and export of files into and out of the workbook are shown in the upper right corner.



Clicking on the “Import” link, or on the “Import” button on the custom toolbar located in the **Add-Ins** menu, will allow you to import a data file into the workbook. You will be prompted to select the data file you want to import. Once you have selected the file, it might be necessary to click the yellow **Enable Content** button below the Excel ribbon. It will take the workbook several seconds (depending on the size of your file) to import the data and run the many macros required to format it properly. You can only import files that have been specifically formatted for import into the workbook by CAS2Net. These files will automatically have been named *ppXXXX\_to\_Sub-Panel\_First\_Last.csv*, where **XXXX** is your pay pool number and **First** and **Last** is the first and last name of the sub-panel manager.

Clicking on the “View” link will take you to the tabbed worksheet called “Data” that is described later in this document. This is where you will do all appraisal score entry and compensation adjustments.

Clicking on the “Export” link (or the “Export” button on the custom toolbar) will allow you to export a data file from the workbook. You will be prompted to confirm the export and to select the location where you want the exported file saved. The workbook will automatically assign the file name *ppXXXX\_to\_Master\_first\_last.csv*. This file is specifically formatted to upload Sub-Panel data to CAS2Net.

## **Summary Reports**

Clicking on the “Rails Report” link takes you to the tabbed worksheet called “Rails” that is described later in this document.

Clicking on the “Career Path Factor Matrices ranked by Final Score” link takes you to the tabbed worksheet called “Matrix” that is described later in this document.

Clicking on the “Summary Statistics of Delta OCS” link takes you to the tabbed worksheet called “Delta Stats” that is described later in this document.

Clicking on the “Distribution of Delta OCS” link takes you to the tabbed worksheet called “Delta Plot” that is described later in this document.

## **Scatter Plot of OCS Score by Salary**

Clicking on the “Current Pay & 2014 SPL” link takes you to the tabbed worksheet called “Cur OCS” that is described later in this document.

## Data

This is the main worksheet in the workbook. It contains all of the employee data and is where individual contribution factors are recorded. The worksheet contains forty-seven columns that are each described in the table at the end of this section.

Sub-Panel Meeting 2014 v2.xls [Compatibility Mode] - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Developer Add-Ins

F10

Return to Main Menu  
Goto Scores

Blue arrows indicate fields set to filter the data.

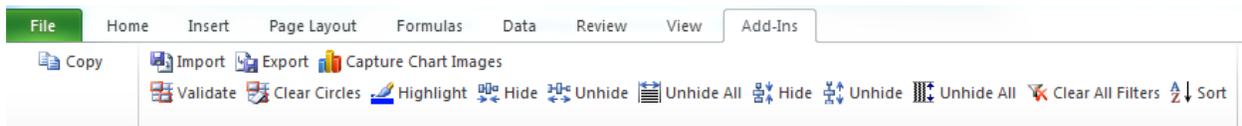
Headings for wildcards. Select cell above heading, arrow down, and edit heading in formula bar.

Total CY 14 Base Pay = \$2,970,540

Last Name	First Name	Middle Initial	Suffix	CAS2Net ID	Paypool	Office Symbol	Wildcard 1	Presumptive Status?	Retained Pay?	Career Path	Broadband Level	Occ Series	CY2014 Base Pay
Burns	Barry			1843	AMC/LH	AMC/LHACA		0	0	NH	2	1515	65,000
Michelson	Nancy			1472	AMC/LH	AMC/LHXT		0	1	NH	4	0830	162,000
Harris	Henry			26	AMC/LH	AMC/LHADADA		0	0	NH	2	0830	57,000
Tarman	Timothy			37	AMC/LH	AMC/LHXSA		0	0	NH	3	0340	78,000
Curtiss	Dan			4	AMC/LH	AMC/LHA		0	0	NH	4	0830	101,250
Hansen	Ike			18	AMC/LH	AMC/LHXTB		0	1	NH	3	0830	98,900
Martinez	Mary			31	AMC/LH	AMC/LHADB		0	0	NH	3	0830	87,000
Artis	Amy			19	AMC/LH	AMC/LHXTA		0	1	NH	2	0318	95,375
Sorenson	Sarah			36	AMC/LH	AMC/LHAC		0	0	NH	3	1515	85,000
Zurbruggen	Zack			42	AMC/LH	AMC/LHXTA		0	0	NH	2	0346	51,000
Udell	Vincent			13	AMC/LH	AMC/LHADB		0	1	NH	3	0850	105,000
Babbitt	Chris			15	AMC/LH	AMC/LHXSA		0	0	NH	3	0803	87,000
Fites	George			17	AMC/LH	AMC/LHXTA		0	0	NH	3	0896	92,000
Celon	Connie			21	AMC/LH	AMC/LHACA		0	0	NH	3	0334	76,000
Evans	Francis			5	AMC/LH	AMC/LHX		0	0	NH	4	0830	115,000
Gonzalez	Helen			6	AMC/LH	AMC/LHAC		0	0	NH	4	0340	129,517
Iverson	John			7	AMC/LH	AMC/LHAD		0	0	NH	4	0830	92,900
Quarles	Richard			11	AMC/LH	AMC/LHACB		0	0	NH	3	0830	79,900
Stewart	Tammy			12	AMC/LH	AMC/LHADADA		0	0	NH	3	0830	86,000

Ready

The upper left corner of the worksheet contains links to the Main Menu (Contents) and Scores section of this worksheet used to enter scores. You can quickly return to the upper left corner of this or any other worksheet by holding down the <Ctrl> key and pressing <Home>. From “Add-Ins”, there are fourteen buttons on the custom toolbar at the top of this worksheet that perform the following functions:



**Import** – Use import to load a data file into the workbook

**Export** – Use export to create a data file for uploading the results to CAS2Net.

**Capture Chart Images** – Brings up a user form that allows output of any/all charts in the CMS spreadsheet either into Excel or PowerPoint format. This is the safest way to output charts from the CMS spreadsheet as employee data is not included with the chart. Charts are copied/pasted as images not as Excel objects.

**Validate** (next row) – Checks the internal consistency of data entered in the worksheet and circles inconsistent entries in red. For example, a numerical factor score that is outside the allowable range for the corresponding category score would be circled. A red flag appears at the top of each column that contains a red circle to help you quickly locate the circles. You cannot run validation while rows or columns are hidden or filters are set – if you do, you will get a warning message reminding you to unhide all columns and rows and clear all filters before running the validation macro.

**Clear Circles** – After clicking on the “Validate” button and correcting any highlighted inconsistencies, this button removes all red circles. You can also click on Validate again to remove the circles and leave any that were not fixed.

**Highlight** – This button allows you to change the background color of any selected cell or range of cells. To remove the highlighting, select the cell or range of cells again, click the highlight button, and choose the white background.

**Hide Column** – The user may hide columns from view by selecting any cell in the columns to be hidden and then clicking on this button. Single columns are selected by clicking on any cell in the column. Multiple columns are selected by holding down the <Ctrl> key while clicking on any cells in the columns. A range of columns is selected by clicking and dragging across any row of cells in the range of columns. The first two columns (A and B) cannot be hidden.

**Unhide Column** – Clicking this button will unhide columns you have just hidden *as long as you have not moved the cursor*. You can also unhide a specific column or range of columns by highlighting cells in the columns on either side of the hidden column or range of columns, and then clicking this button.

**Unhide All Columns** – This button restores to view all hidden columns.

**Hide Row** – The user may hide rows from view by selecting any cell in the row or rows to be hidden and then clicking on this button. A single row is selected by clicking on any cell in the row. Multiple rows are selected by holding down the <Ctrl> key while clicking on any cells in the rows. A range of rows is selected by clicking and dragging up or down any column of cells.

**Unhide Row** – Clicking this button will unhide rows you have just hidden *as long as you have not moved the cursor*. You can also unhide a specific row or range of rows by highlighting cells in the rows on either side of the hidden rows or range of rows, and then clicking this button.

**Unhide All Rows** – This button restores to view all hidden rows.

Each column heading contains a **filter** arrow for the column. Clicking on the filter arrow brings up a list of all of the values in the column, plus the following other choices: All, Top 10, Custom, Blanks, Non-Blanks. The user can limit which rows are displayed by filtering on specific values in one or more columns. For example, the display could be limited to only NH-4 employees by filtering on “NH” in column K and “4” in column L. When a filter is active, the filter arrow turns blue. A filter may be de-activated by selecting “All” under the filter choices. Blanks and Non-Blanks may also be used for filtering. For example, to identify employees who do not yet have numerical scores on a particular factor, select “Blanks” in the filter for the factor score column. The “Top 10” choice displays the ten highest values in a column – it can only be used with numerical data. The “Custom” choice allows the user to design more complex filter criteria.

**Clear All Filters** – This button clears all filters you have set, including filters on worksheets other than the one you are currently on. You cannot import data into the workbook with filters set, so any time you click the “Import” link on the Contents sheet all filters are automatically cleared.

**Sort** – Allows the user to sort the rows in the worksheet by any combination of up to three columns. Sorts may be in either ascending or descending order. The sorts are specified using the standard Excel sort function. You must know the letters of the columns you want to sort on because the column headings cannot be included in the sort range.

There are five open rows colored light blue at the bottom of the worksheet (see below). These rows, which are below all of the data records, provide cells in which the user can enter formulas to compute column statistics (sums, means, counts, etc.). If you want the formulas to be re-applied each time you import data into the spreadsheet, you must include in the formula’s range the row immediately above and below the data range. In other words, if you have 50 records in your spreadsheet, the first record is in row 11 and the last record is in row 60. If you want to compute the average CY 2014 base pay, you would enter the following formula in cell N64: AVERAGE(N10:N61). Now, each time you import a file into the workbook, this formula will be applied to the data in column N, no matter how many records are included in the import. If you only include the data rows in the formula range (N11:N60 in the example), the formula will return a reference error after each import. To preserve formulas in the open rows you must import data into the *same* workbook into which you entered the formulas – the formulas in the open rows are not included in the import and export routines.

The first light blue row can also be used to hide columns. Entering an ‘X’ in any column, except for the first two, will cause that column to be hidden when the *Hide Columns* button is clicked. This can be handy, especially for selecting non-adjacent columns that are repeatedly hidden and unhidden. See image below. Note that cell(s) simply selected by your cursor will also cause the column(s) to be hidden.

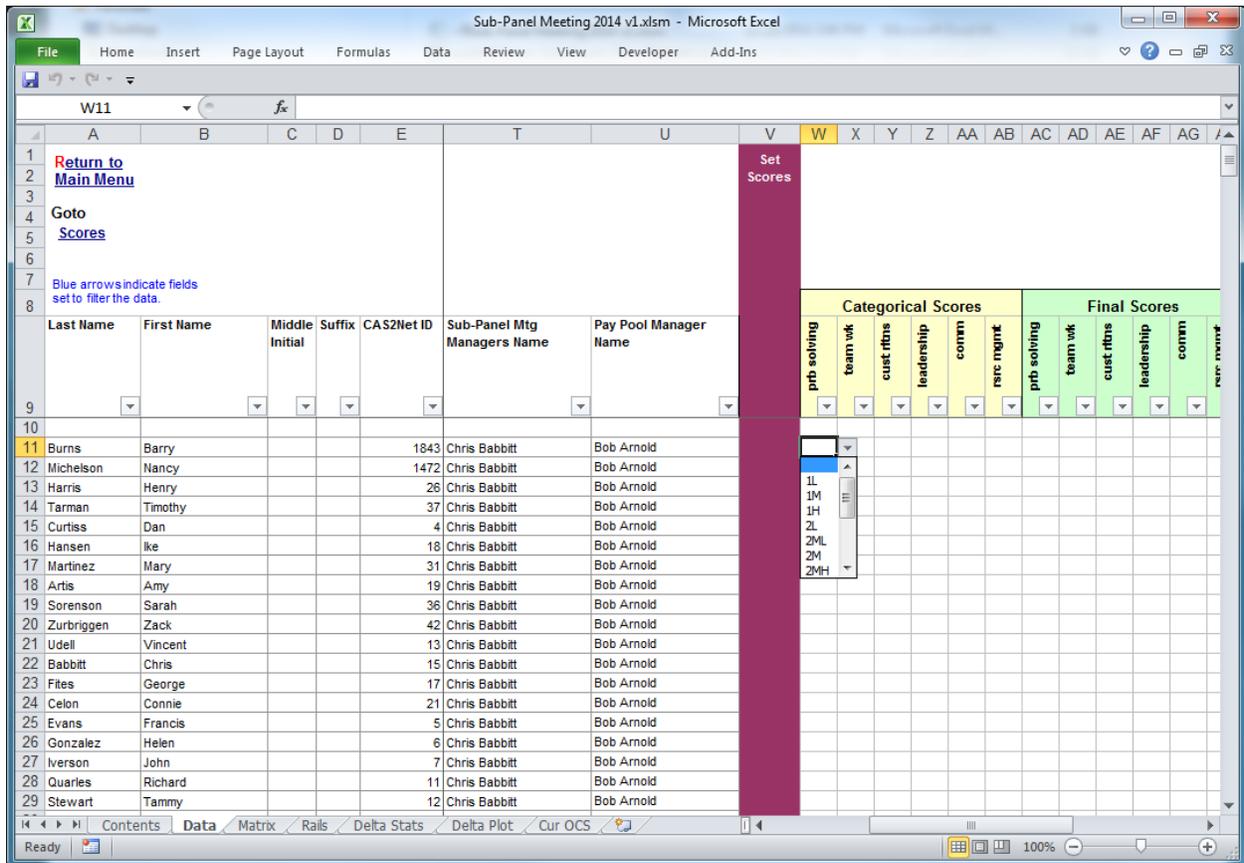
52	Prince	Wiseman		112003736	AMCLH		0	0	NK	2	0986	28,529	\$28,5
53	Monday	Kooser		112003616	AMCLH		0	0	NK	2	0318	29,189	\$29,1
54	Kat	Cady		112003256	AMCLH		0	0	NK	3	0319	55,588	\$55,5
55	Kaelea	Loewentsein		112003216	AMCLH		0	0	NK	2	0318	28,066	\$28,0
56	Betty	Crossen		112002396	AMCLH		0	0	NK	2	0326	33,769	\$33,7
57	Williams	Wilson		231538512	AMCLH	AMCLHXSB	0	0	NK	2	0086	35,105	\$35,1
58													
59													
60	<b>Open Rows</b>												
61	Enter an X in this row to hide columns												
62		X			X								X
63													
64													
65													
66													
67	Career Path												

[Contents](#) \ [Data](#) \ [Matrix](#) \ [Rails](#) \ [Delta Stats](#) \ [Delta Plot](#) \ [Cur OCS](#) \ [Inf OCS](#)

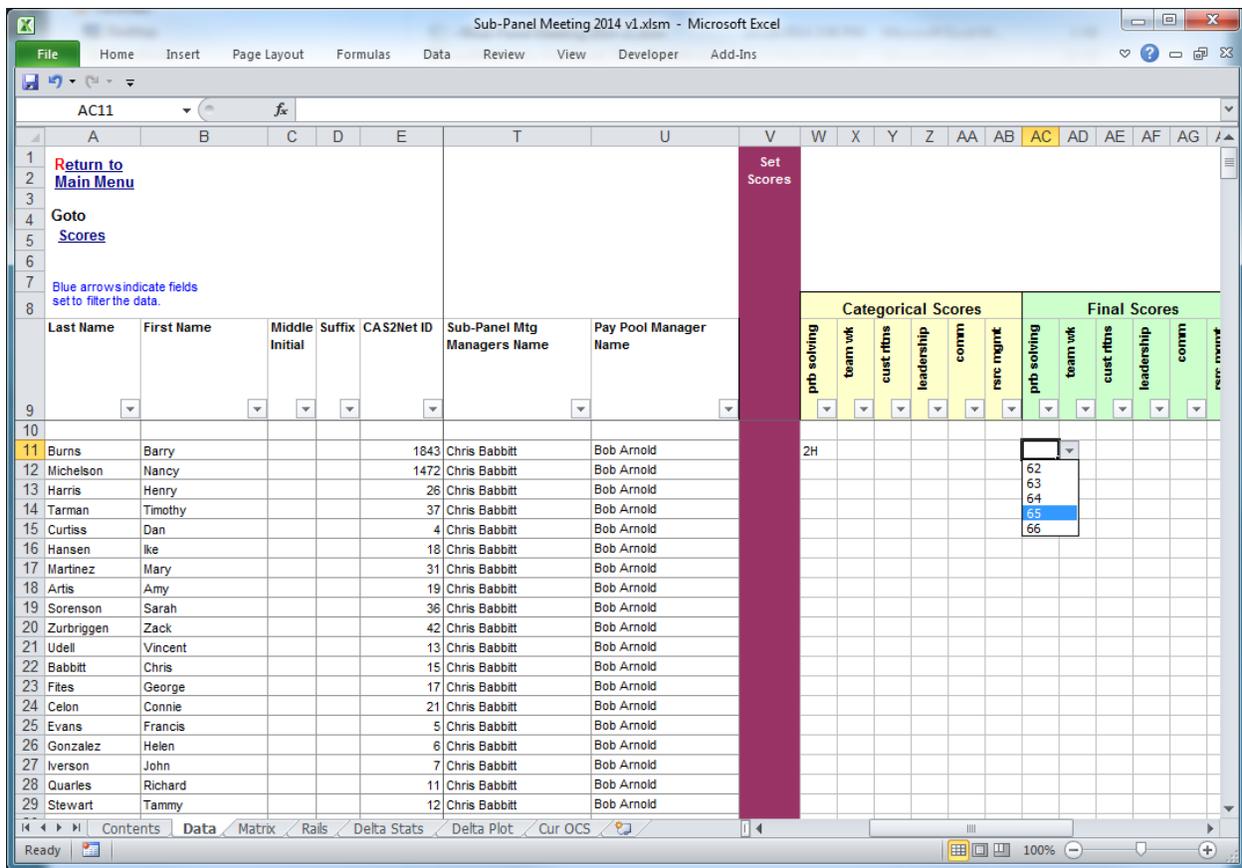
## Assigning Scores on the Data Sheet

Column W on the Data Sheet marks the beginning of the score matrix for the sub-panel. The first six columns show the categorical factor scores, the second six columns show the integer scores.

Categorical scores are optional but can help determine final scores. Each Career Path and Broadband level combination has their own valid range of categorical scores. In the example below the sub-panel has decided to assign Barry Burns a Categorical score of 2H for Problem Solving by clicking the appropriate cell and then clicking the desired score.



For each Categorical Score, there is a valid list of Final Scores. For 2H the valid Final Score range is 62 to 66. The sub-panel has decided to assign a final score of 65. This is accomplished by clicking the appropriate cell and choosing the desired score. See below.



There is an additional method for setting scores described later in this document named *Group into Categories* which uses a user form. This approach allows for ranking of employees in lists which can aid in assigning scores.

## Data Sheet Column Descriptions

Sources:      1 = Import file (locked in spreadsheet, can be changed in CAS2Net)  
                   2 = Computed by spreadsheet (locked)  
                   3 = User entry (shaded below)

Col	Source	Description
<b>A</b>	<b>1</b>	Employee's last name
<b>B</b>	<b>1</b>	Employee's first name
<b>C</b>	<b>1</b>	Employee's middle initial
<b>D</b>	<b>1</b>	Employee's suffix (e.g., Jr, II)
<b>E</b>	<b>1</b>	Employee's CAS2Net ID number
<b>F</b>	<b>1</b>	Employee's Pay pool number
<b>G</b>	<b>1</b>	Employee's office symbol
<b>H</b>	<b>3</b>	First open (wildcard) column for pay pool use. Values entered or computed in this column will be saved in any export back to CAS2Net, and will be returned to this worksheet in subsequent imports. However, formulas entered in this column will not be preserved through subsequent export-import cycles <b>unless the formula is also entered in the yellow cell immediately below the wide gray line after the last person's record</b> . The formula is only saved if you import back into the same spreadsheet you used to do the export. You can change the column heading by clicking in the cell immediately above the heading, using the down arrow to enter the cell, and changing the heading in the formula bar.
<b>I</b>	<b>1</b>	Employee's presumptive status (0 = none, 1 = due to time, compute OCS from SPL and current pay, 2 = due to circumstances, compute OCS from SPL and current pay, 3 = due to circumstances, recertify previous OCS)
<b>J</b>	<b>1</b>	Retained pay (0 = no, 1 = yes, no CRI, eligible for CA, GPI = half the dollar increase in maximum pay for the employee's broadband and career path)
<b>K</b>	<b>1</b>	Career path (NH = Business Management and Technical Management Professional, NJ = Technical Management Support, NK = Administrative Support)
<b>L</b>	<b>1</b>	Broadband level (1, 2, 3, or 4)
<b>M</b>	<b>1</b>	Occupational series
<b>N</b>	<b>1</b>	CY 2014 annual basic pay rate
<b>O</b>	<b>2</b>	Reflects max of band for employees on retained pay employees instead of base pay. Used for calculating columns such as expected OCS.
<b>P</b>	<b>1</b>	Locality pay area code
<b>Q</b>	<b>1</b>	OCS from the previous cycle
<b>R</b>	<b>1</b>	Start date – the date the employee first entered AcqDemo. This date does NOT change when employees move from one AcqDemo pay pool to another.
<b>S</b>	<b>1</b>	Name of the employee's first level supervisor

Col	Source	Description
<b>T</b>	<b>1</b>	Sub-Panel meeting identifier. This can be the name of the manager who will chair the sub-panel meeting at which the employee's contribution scores will be assigned, or it could be an organization code or other identifier for a group of employees. CAS2Net can export separate files for each unique identifier in this column.
<b>U</b>	<b>1</b>	Name of the employee's pay pool manager. This name will appear on Part I of the CMS Salary Appraisal Form given to the employee.
<b>V</b>		<b>Marks the start of the appraisal score section of the spreadsheet</b>
<b>W</b>	<b>3</b>	Category score for contribution factor "Problem Solving". Categories are selected from a drop down list by first clicking in the cell and then clicking on the down arrow. Only categories appropriate to the employee's career path are displayed. If the import file contains this score, it will appear in the spreadsheet. Once category scores are selected <b>do not</b> use the delete key to remove them because this disables the corresponding numerical score drop down list. If you want to remove a category score, select the first (blank) entry on the drop down list.
<b>X</b>	<b>3</b>	Category score for contribution factor "Teamwork/Cooperation". Categories are selected from a drop down list by first clicking in the cell and then clicking on the down arrow. Only categories appropriate to the employee's career path are displayed. If the import file contains this score, it will appear in the spreadsheet. Once category scores are selected <b>do not</b> use the delete key to remove them because this disables the corresponding numerical score drop down list. If you want to remove a category score, select the first (blank) entry on the drop down list.
<b>Y</b>	<b>3</b>	Category score for contribution factor "Customer Relations". Categories are selected from a drop down list by first clicking in the cell and then clicking on the down arrow. Only categories appropriate to the employee's career path are displayed. If the import file contains this score, it will appear in the spreadsheet. Once category scores are selected <b>do not</b> use the delete key to remove them because this disables the corresponding numerical score drop down list. If you want to remove a category score, select the first (blank) entry on the drop down list.
<b>Z</b>	<b>3</b>	Category score for contribution factor "Leadership/Supervision". Categories are selected from a drop down list by first clicking in the cell and then clicking on the down arrow. Only categories appropriate to the employee's career path are displayed. If the import file contains this score, it will appear in the spreadsheet. Once category scores are selected <b>do not</b> use the delete key to remove them because this disables the corresponding numerical score drop down list. If you want to remove a category score, select the first (blank) entry on the drop down list.

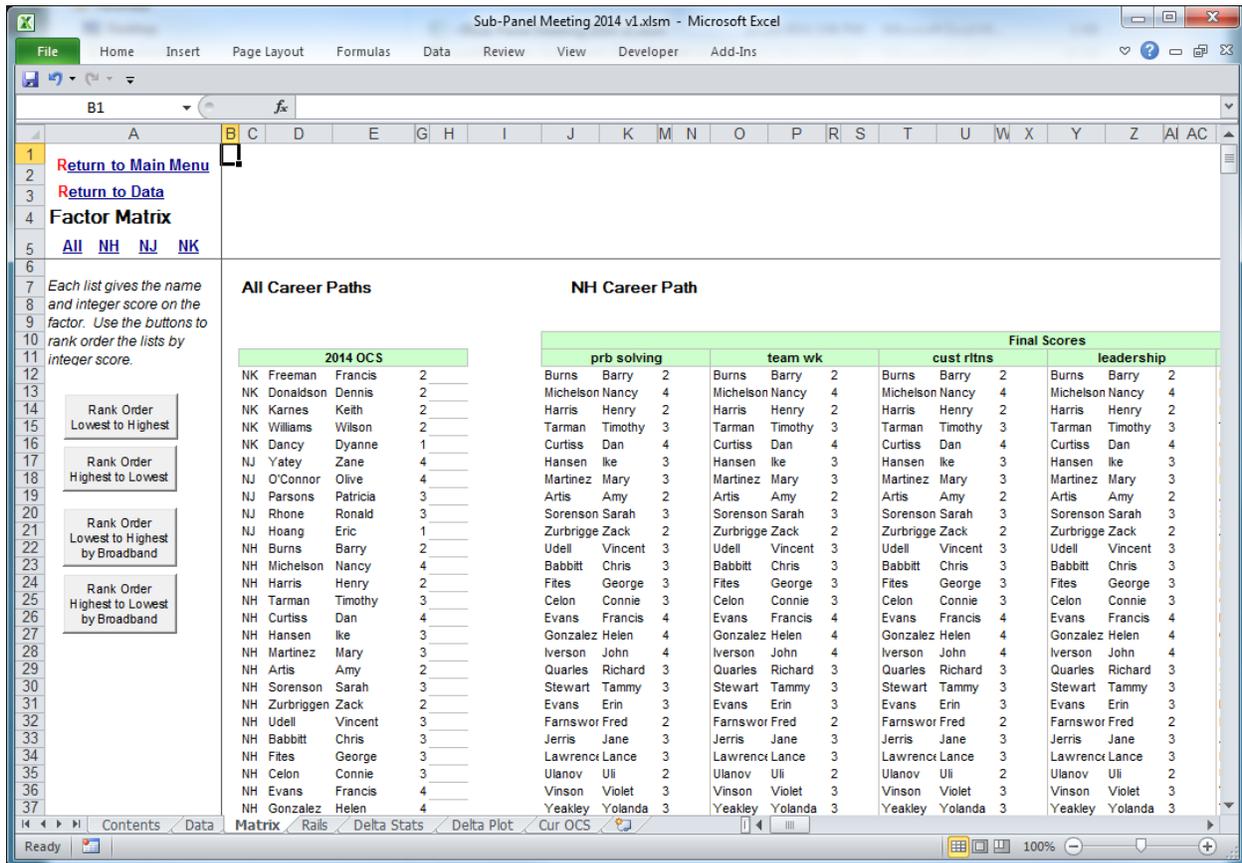
Col	Source	Description
AA	3	Category score for contribution factor "Communication". Categories are selected from a drop down list by first clicking in the cell and then clicking on the down arrow. Only categories appropriate to the employee's career path are displayed. If the import file contains this score, it will appear in the spreadsheet. Once category scores are selected <b>do not</b> use the delete key to remove them because this disables the corresponding numerical score drop down list. If you want to remove a category score, select the first (blank) entry on the drop down list.
AB	3	Category score for contribution factor "Resource Management". Categories are selected from a drop down list by first clicking in the cell and then clicking on the down arrow. Only categories appropriate to the employee's career path are displayed. If the import file contains this score, it will appear in the spreadsheet. Once category scores are selected <b>do not</b> use the delete key to remove them because this disables the corresponding numerical score drop down list. If you want to remove a category score, select the first (blank) entry on the drop down list.
AC	3	Final numerical score for contribution factor "Problem Solving". If a category score for this factor was entered, the numerical score is selected from a drop down list by first clicking in the cell and then clicking on the down arrow; only numbers appropriate to the category are displayed. If no category score was entered, the entire range of numerical scores for the employee's career path is displayed in the drop-down list. If the import file contains this score, it will appear in the spreadsheet.
AD	3	Final numerical score for contribution factor "Teamwork/Cooperation". If a category score for this factor was entered, the numerical score is selected from a drop down list by first clicking in the cell and then clicking on the down arrow; only numbers appropriate to the category are displayed. If no category score was entered, the entire range of numerical scores for the employee's career path is displayed in the drop-down list. If the import file contains this score, it will appear in the spreadsheet.
AE	3	Final numerical score for contribution factor "Customer Relations". If a category score for this factor was entered, the numerical score is selected from a drop down list by first clicking in the cell and then clicking on the down arrow; only numbers appropriate to the category are displayed. If no category score was entered, the entire range of numerical scores for the employee's career path is displayed in the drop-down list. If the import file contains this score, it will appear in the spreadsheet.
AF	3	Final numerical score for contribution factor "Leadership/Supervision". If a category score for this factor was entered, the numerical score is selected from a drop down list by first clicking in the cell and then clicking on the down arrow; only numbers appropriate to the category are displayed. If no category score was entered, the entire range of numerical scores for the employee's career path is displayed in the drop-down list. If the import file contains this score, it will appear in the spreadsheet.

Col	Source	Description
AG	3	Final numerical score for contribution factor "Communication". If a category score for this factor was entered, the numerical score is selected from a drop down list by first clicking in the cell and then clicking on the down arrow; only numbers appropriate to the category are displayed. If no category score was entered, the entire range of numerical scores for the employee's career path is displayed in the drop-down list. If the import file contains this score, it will appear in the spreadsheet.
AH	3	Final numerical score for contribution factor "Resource Management". If a category score for this factor was entered, the numerical score is selected from a drop down list by first clicking in the cell and then clicking on the down arrow; only numbers appropriate to the category are displayed. If no category score was entered, the entire range of numerical scores for the employee's career path is displayed in the drop-down list. If the import file contains this score, it will appear in the spreadsheet.
AI	1	Weight on contribution factor "Problem Solving" (must be "1" this year)
AJ	1	Weight on contribution factor "Teamwork/Cooperation" (must be "1" this year)
AK	1	Weight on contribution factor "Customer Relations" (must be "1" this year)
AL	1	Weight on contribution factor "Leadership/Supervision" (must be "1" this year)
AM	1	Weight on contribution factor "Communication" (must be "1" this year)
AN	1	Weight on contribution factor "Resource Management" (must be "1" this year)
AO	3	Second open (wildcard) column for pay pool use. Values entered or computed in this column will be saved in any export back to the Oracle application, and will be returned to this worksheet in subsequent imports. However, formulas entered in this column will not be preserved through subsequent export-import cycles <b>unless the formula is also entered in the yellow cell immediately below the wide gray line after the last person's record</b> . The formula is only saved if you import back into the same spreadsheet you used to do the export. You can change the column heading by clicking in the cell immediately above the heading, using the down arrow to enter the cell, and changing the heading in the formula bar.
AP	3	Third open (wildcard) column for pay pool use. Values entered or computed in this column will be saved in any export back to the Oracle application, and will be returned to this worksheet in subsequent imports. However, formulas entered in this column will not be preserved through subsequent export-import cycles <b>unless the formula is also entered in the yellow cell immediately below the wide gray line after the last person's record</b> . The formula is only saved if you import back into the same spreadsheet you used to do the export. You can change the column heading by clicking in the cell immediately above the heading, using the down arrow to enter the cell, and changing the heading in the formula bar.
AQ	2	Expected OCS, computed from CY2014 basic pay and the formula for the Standard Pay Line (SPL).
AR	2	Expected OCS Range, computed from the 2014 lower rail and upper rail pay and the Standard Pay Line (SPL).

Col	Source	Description
AS	2	2014 OCS, computed as the weighted average of the six numerical factor scores for non-presumptive employees. If any of the <u>final numerical</u> factor scores are blank, this field will be #N/A. For presumptive status = 1 or 2, 2014 OCS is calculated as $\text{Expected OCS} = \frac{\text{LN}(\text{Base Pay} / \text{GS-1step1pay 2014})}{\text{LN}(1.0200423)}$ . For presumptive status = 3, last year's score is recertified.
AT	2	Delta OCS, computed as the difference between Expected OCS (column BG) and 2014 OCS (column BH)
AU	2	Rail position based on final numerical OCS and current basic pay (A = above the upper rail, B = below the lower rail, C1 = above the SPL but below the upper rail, C2 = on or below the SPL but on or above the lower rail)

# Matrix

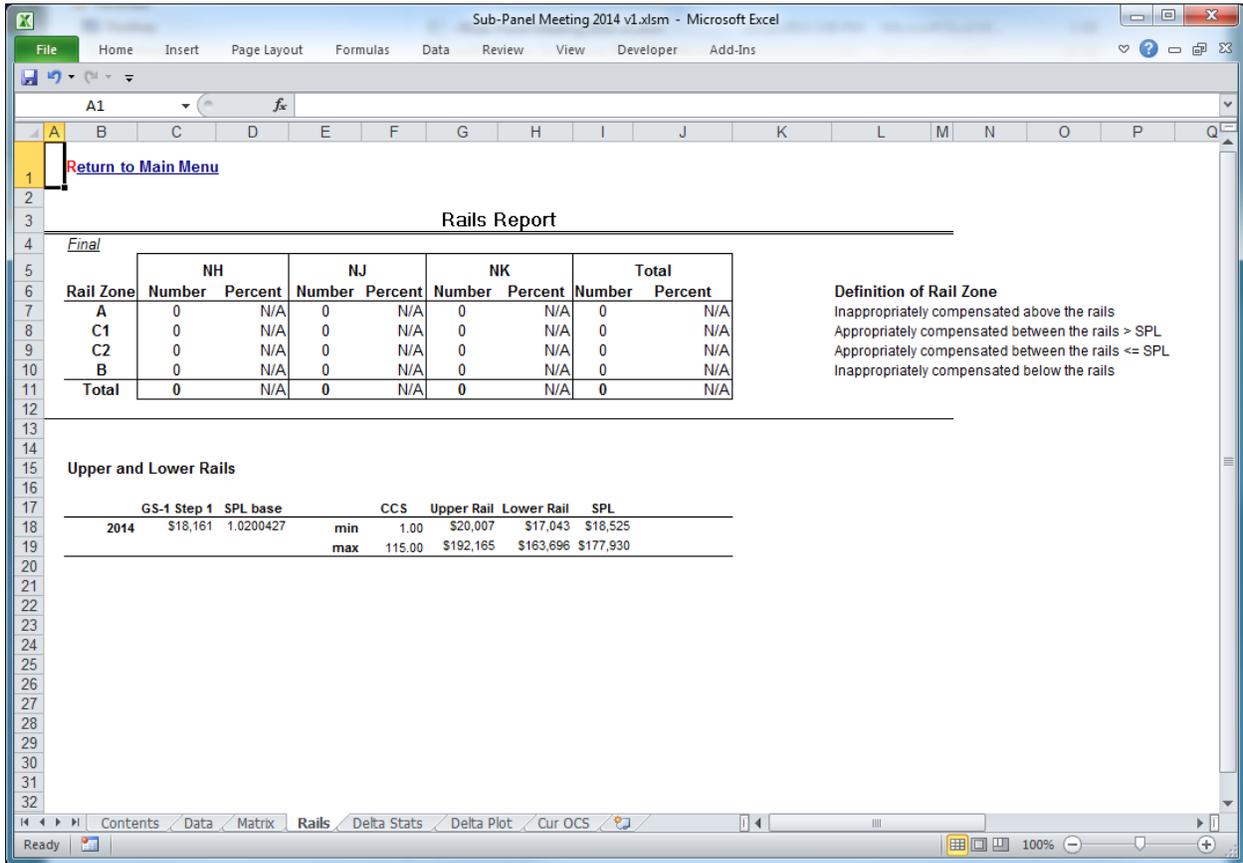
This worksheet, part of which is shown below, rank orders employees by individual factor score and by OCS. Employees are identified by career path, last name, first name, and broadband. The sort order on scores (low to high or high to low) may be done by broadband or across all broadband. The order can be selected with the four buttons on the left. There are links in the upper left corner to return to the Main Menu (Contents) worksheet or the Data worksheet.



The first matrix orders all employees in all career paths based on their OCS. The second matrix orders all employees in the NH career path according to each of the six final numerical factor scores, and by OCS. The second and third matrices (off the screen to the right in the figure above) order all of the NJ and NK employees. The career path links in the upper left corner of the worksheet are for quick navigation among the matrices – you can also browse through the worksheet using the scroll bars at the bottom and right of the screen. The data can be printed by clicking on the printer icon on the Excel toolbar. The all career path matrix is printed on one page, and each career path matrix is printed on a separate page.

## Rails Report

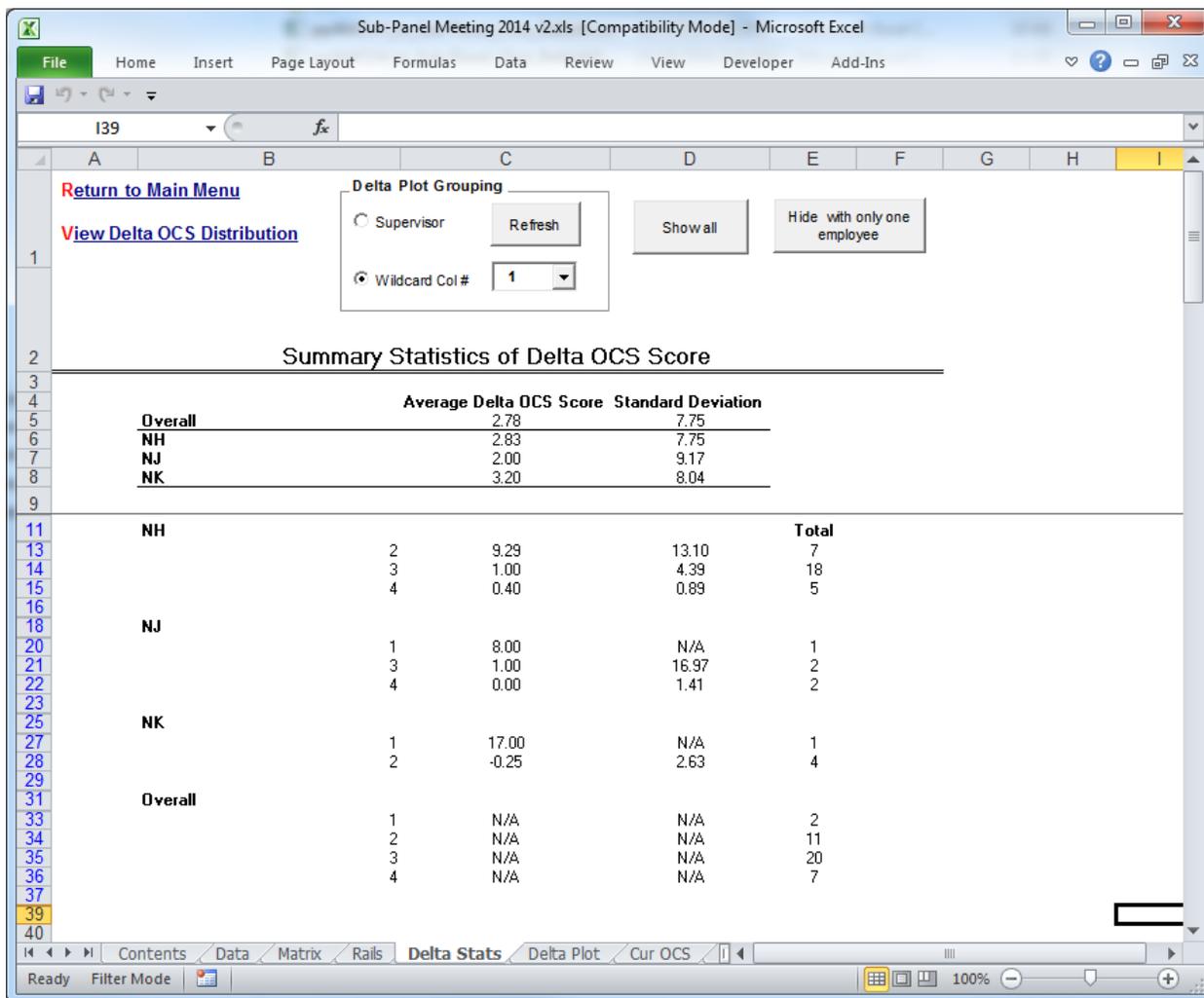
This worksheet provides counts and percentages of employees by rail position. The table shows rail position by career path based on **final, numerical** OCS. There is a link to the Main Menu (Contents) worksheet in the upper left corner, and the report can be printed by clicking on the printer icon in the Excel toolbar.



Below the rails report there are some parameters and computations relating to the current year and next year's SPL and rails. These values are used internally by the workbook and are not intended for pay pool use.

## Delta Statistics

This worksheet displays Delta OCS averages and standard deviations. Delta OCS is the difference between an employee’s actual OCS and expected OCS, as computed from current salary and the formula for the SPL. Standard deviation is a statistical measure of the range, or dispersion of Delta OCS values.



The top of the worksheet shows statistics by career path and overall. The bottom of the worksheet shows statistics for groups of employees within each career path.

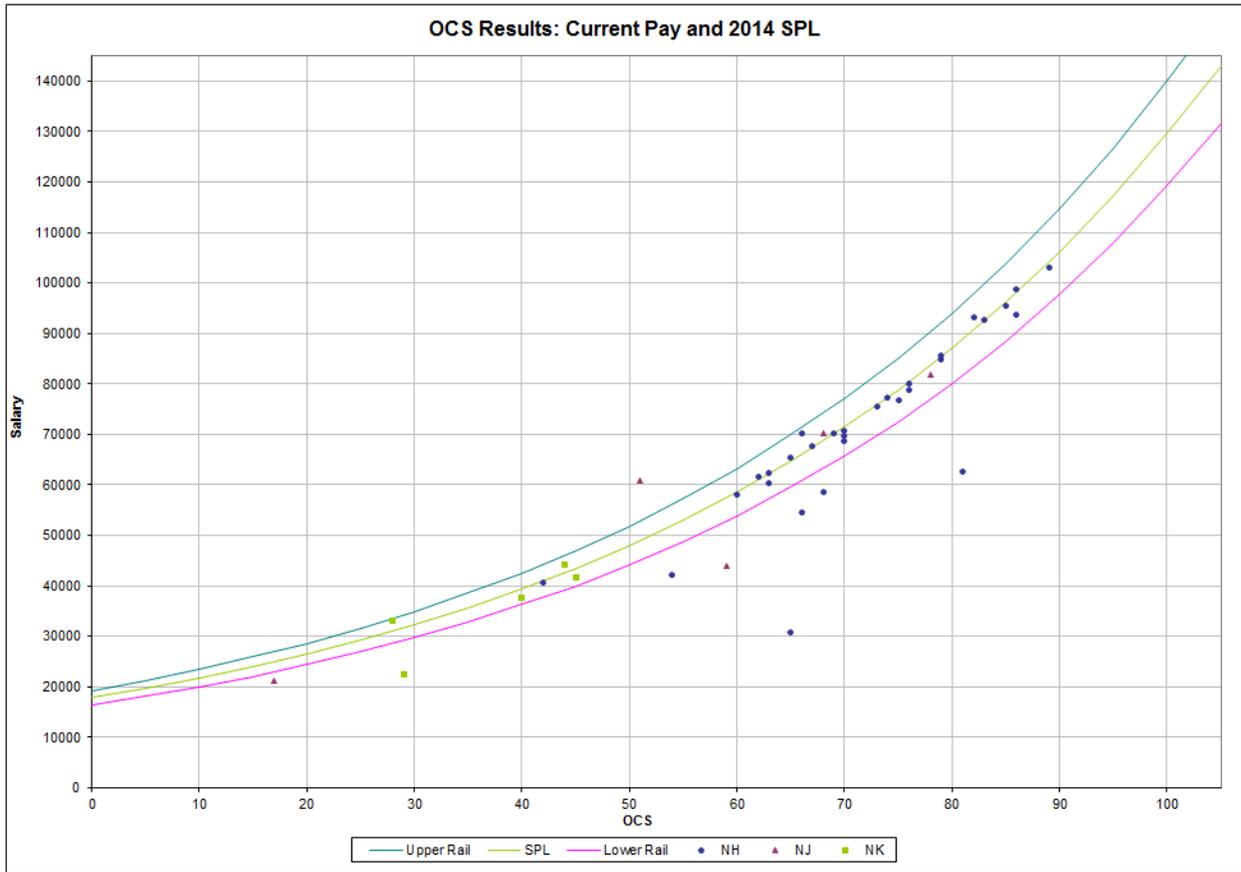
The groups can be defined by either first level supervisor (column S on the Data sheet) or any other grouping scheme entered into Wildcard columns (H, AO, AP) on the main data sheet. The “Delta Plot Grouping” box at the top of this worksheet contains radio buttons that allows you to switch groupings between first level supervisor and the Wildcard columns. Note that the example shown above uses broadband level to define the groups. To make this happen, the data from column L (Broadband Level) on the main data worksheet was first copied into Wildcard #1, and then the Wildcard #1 radio button was selected in the Delta Plot Grouping box at the top of

this worksheet. If you change the groupings in Wildcard #1, be sure to click the “Refresh” button in the Delta Plot Grouping box to re-compute the statistics.

Since standard deviations cannot be computed for distributions with only one data point, groups with only one employee show N/A for standard deviation. If you wish to filter out these cases, click on the button labeled “Hide with only 1 employee” at the top of the worksheet. To restore the display of these groups, click on the “Show all” button.

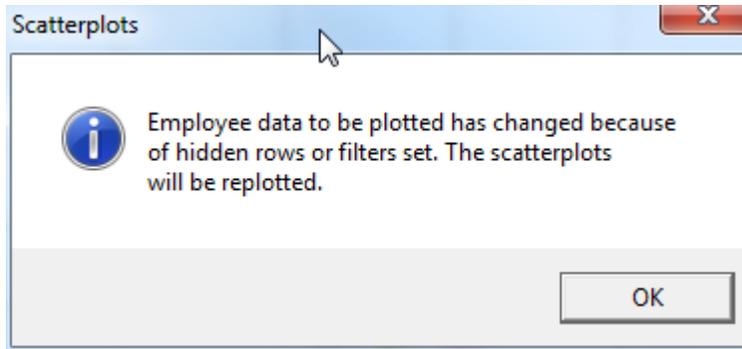
The upper left corner of the worksheet contains a link back to the Main Menu “Contents” worksheet.

## Current OCS Scatter Plot



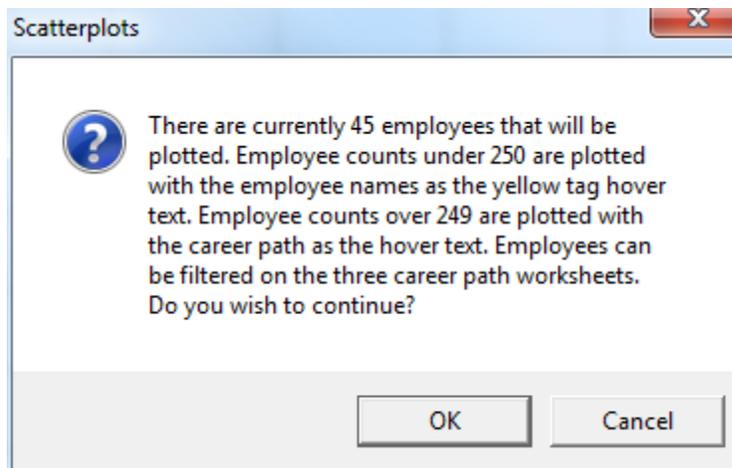
Scatter plots of OCS vs. pay, displayed on top of the SPL and rails, have proven to be excellent tools for visualizing the overall outcome of the appraisal and pay setting process. The workbook contains one plot, which is OCS vs. current (unadjusted) pay on top of the CY2014 SPL and rails (example above).

This plot shows, for each career path, how employee pay and contribution during 2014 compared to the SPL and rails for that year. You can filter employees as well as hide rows on the Data tab. This will preclude those employees from appearing on the scatterplot. If you have set a filter or hidden rows the following message box will appear.

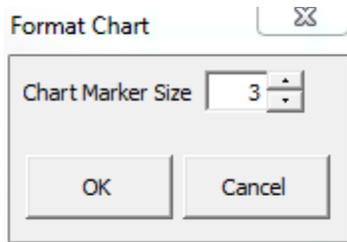


After you click OK the scatterplot will be replotted with only those employees visible on the Data tab. A replot can also be accomplished by click the Replot button on the custom toolbar.

On the worksheet you can identify the specific values associated with a dot on the graph by placing the mouse pointer on the dot. The values will appear in a yellow pop-up text box. These values differ depending on how many employees are charted. If there are 255 employees or more, the career path, along with the salary and OCS, of the employee appears in the text box. If there are less than 255, the name of the employee, along with salary and OCS, are visible. This is a result of a limitation in Excel. Employees can be filtered on the Data sheet to bring the employee counts below 255 and then return to one of the three scatterplot tabs and click the *Replot* button. A message appears like the one below.



You can adjust the size of the symbols on the plot by clicking on the custom toolbar icon labeled "Format". This will give you a pop-up like the one shown below in which you can increase or decrease the default font size of the markers.



The plot may be printed by clicking on the printer icon on the Excel tool bar.

## Group into Categories

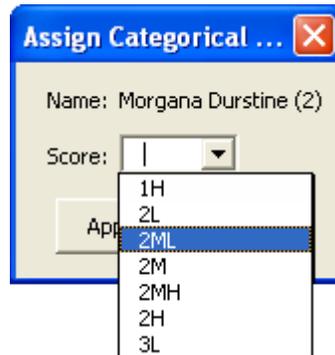
One of the more useful features of the sub-panel spreadsheet is the ability to assign employee ratings via a user form. Click the *Group into Categories* link on the *Contents* sheet to see the form below.

1H (24 - 29)	2L (22 - 29)	2ML (30 - 40)	2M (41 - 50)
	Stew Bryan (2) 28	Goddard Baker (2) 40	
	Michael Bennett (2) 27	Matilda Tillson (2) 35	
		Rafe Bairds (2) 32	

Because available scores vary by career path, each career path must be addressed separately. You begin by selecting a career path, a factor, and the contribution level to be scored. If there are individuals in the career path who have not yet been assigned a category score for the selected factor, that employee's name will appear in the "Unrated" box. Employees who have already been assigned a categorical score for the factor are listed in the appropriate category score box. Note that the broadband of each employee is listed in parentheses after the employee's name.

If there are employees in the *Unrated* box, they will need to be moved to the appropriate score category box. This can be initiated by either double clicking on the name of the employee or by highlighting the employee's name with a single click and then clicking on the *Move from Unrated* button.

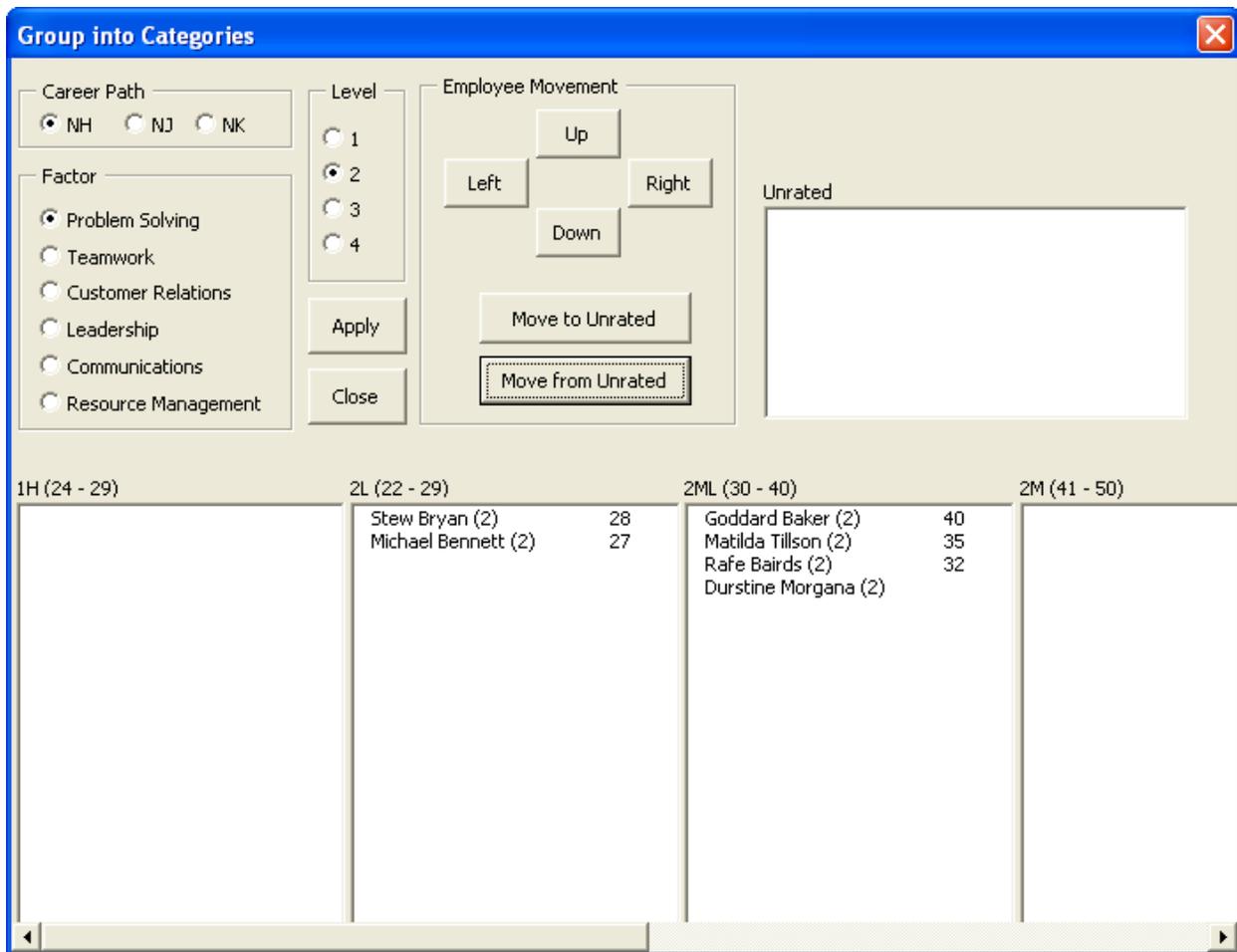
In either case, we will now be presented with a drop down list box for choosing the categorical score.



The drop down list includes the allowable scores for that level as well as the scores one above and one below that range. You can either enter an allowable score directly into the *Score:* box or click on the down arrow to select a score from the list

Once the sub-panel selects a score, click the “Apply” button. The selected employee’s name will then be moved to the bottom of the list in the appropriate categorical score box.

In this case, we have assigned Morgana Durstine a category 2ML score for problem solving. Note that she has been placed at the bottom of the 2ML category score box. See below.



Now that Morgan has been placed in the 2ML category for problem solving, you might want to move her to a position in the list to indicate her contribution relative to others in the same category. The sub-panel decides that her contribution is greater than that of Rafe Bairds but less than that of Matilda Tillson. To move her to this position, you highlight her name in the 2ML category box and click the *Up* button in the “Employee Movement” area at the top center of the screen. The first click moves her to just below Rolf. See below.

**Group into Categories**

Career Path  
 NH  NJ  NK

Factor  
 Problem Solving  
 Teamwork  
 Customer Relations  
 Leadership  
 Communications  
 Resource Management

Level  
 1  
 2  
 3  
 4

Employee Movement

Unrated

1H (24 - 29)      2L (22 - 29)      2ML (30 - 40)      2M (41 - 50)

	Stew Bryan (2)      28	Goddard Baker (2)      40	
	Michael Bennett (2)      27	Matilda Tillson (2)      35	
		<b>Durstine Morgana (2)</b>	
		Rafe Bairds (2)      32	

Continuing with Morgana Durstine, you double click on her name in the 2ML category box. The *Assign Integer Score* box now appears, with a drop down list of allowable scores.

**Assign Integer Score**

Name: Morgana Durstine (2)  
 Category: Problem Solving  
 Pre-Score: 2ML  
 Final Score:

- 33
- 34
- 35
- 36
- 37
- 38
- 39
- 40**

Scores are assigned by either clicking the desired score or typing it in using the keyboard and then clicking the *Apply* button to save the score to the list box on the user form. Notice the score of 40 we assigned to her is to the right of her name now.

1H (24 - 29)	2L (22 - 29)	2ML (30 - 40)	2M (41 - 50)
	Stew Bryan (2) 28	Goddard Baker (2) 40	
	Michael Bennett (2) 27	Matilda Tillson (2) 35	
		Durstine Morgana (2) 40	
		Rafe Bairds (2) 32	

Clicking the *Apply* button will save any scores assigned, categorical or integer, to the spreadsheet as well as sort the list box descending by integer score.

Clicking the *Close* button closes the form and returns the user to the sub-panel spreadsheet.