PeopleSoft HCM 9.2: eCompensation

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Bold	Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. Italics also highlight references to words or letters, as in the following example: Enter the letter *O*.
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
`Monospace font`	Highlights a PeopleCode program or other code example.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

Typographical Convention	*Description*
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America

- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What’s new in the PeopleSoft Online Help.
- PeopleSoft Online Help acessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

PeopleSoft HCM Related Links

PeopleSoft Information Portal on Oracle.com

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

HCM Abbreviations

Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

Follow Us

Get the latest PeopleSoft updates on Facebook.

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Chapter 1

Getting Started with eCompensation

eCompensation Overview

eCompensation comprises self-service transactions that interface with the PeopleSoft HCM system. Workers can:

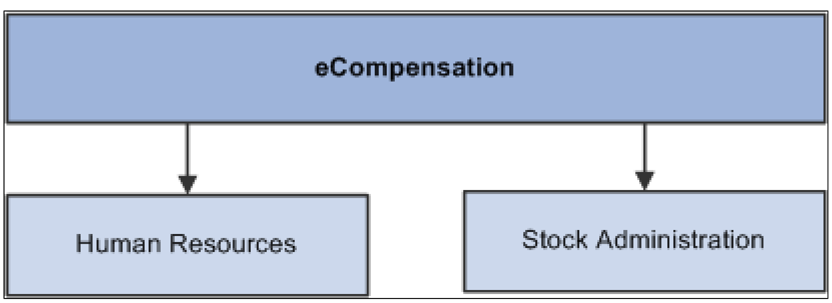
- Review their compensation histories.
- (FRA) View and update agreement and investment information.
- (FRA) View profit sharing amount and request release of part or all of their entitlement.

eCompensation Integrations

eCompensation integrates with the following PeopleSoft applications.

Image: eCompensation integration flow with other PeopleSoft HR and Stock Administration applications

This diagram illustrates the PeopleSoft products that eCompensation integrates with, which includes Human Resources and Stock Administration.



eCompensation Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

Chapter 2

Viewing Compensation History

Viewing Compensation History

To view compensation history, use the Compensation History (HR_ECOM_EE_HIST) component.

This section provides an overview of the pages used to view compensation history.

Pages Used to View Compensation History

Page Name	***Definition Name***	***Navigation***	***Usage***
Compensation History	HR_ECOMP_EE_HIST	Self Service, Payroll and Compensation, Compensation History	View compensation history.
Award Details	HR_ECOMP_VC_SEC	Click a date of change link on the Compensation History page.	View details of a compensation change.

Understanding the Pages Used to View Compensation History

Workers use this transaction to view their compensation histories. The Compensation History page displays various types of compensation changes that were applied to the worker, including base salary, variable cash, variable non-cash and stock option.

Workers can:

- Click a date link to view additional information about the corresponding compensation change in a modal window.
- Click the chart icon to view the compensation data (base salary, stock option, and variable cash) in a graphical format.

For more information about the Compensation History page, see the product documentation for "Reviewing Employee Compensation *(PeopleSoft HCM 9.2: eCompensation Manager Desktop)*". The functionality and appearance of the page are the same for managers (viewing data of their direct reports) and employees (viewing their own data), except that the employee view of the compensation history chart includes the Job filter if the employee has multiple jobs.

Chapter 3

(FRA) Profit-Sharing Self-Service Transactions

Understanding the Profit-Sharing Self-Service Transactions

eCompensation includes two self-service transactions that enable workers to access their profit-sharing data. Profit-sharing and worker's participation agreements are defined and managed using the Manage French Profit Sharing business process within PeopleSoft HCM.

Workers use these profit-sharing self-service components to view and update this information:

- Agreement Personalization (HR_SS_WP_AGREEMENT)

  Workers use this transaction to view details of the agreement and to update investment information.

- Profit-Sharing Entitlements (HR_SS_WP_PROFIT_SH)

  Workers use this transaction to view details of their profit-sharing amount and to request release of part or all of their entitlement.

Note: Worker options are also provided with the Manage Profit Sharing business process in PeopleSoft HCM.

Pages Used by the Profit-Sharing Self-Service Transactions

Page Name	*Definition Name*	*Navigation*	*Usage*
Agreement Information	HR_SS_WP_AGRT_DTL	Self Service, Payroll and Compensation, Agreement Personalization, Agreement Information	View details of the agreements for which they are eligible. This includes the agreement type, agreement start and end date, agreement duration, investment methods, and computed global fund. Workers can also view the agreement document from this page.
Investment Details	HR_SS_WP_AGRT_INV	Click the investment link in the Proposed Investments group box on the Agreement Information page.	Display information about the investment method. The fields displayed vary according to the investment method.

Page Name	***Definition Name***	***Navigation***	***Usage***
View Formula	HR_SS_WP_AGRT_FML	Click the View Formula link in the Computed Global Fund on the Agreement Information page.	View the funding formula associated with the agreement.
Personalize Agreement Options	HR_SS_WP_AGRT_PRS	Click the Personalize Agreement link on the Agreement Information page.	Select an investment method for their funds. For profit-sharing agreements with Company Investment as the investment method, workers can also select whether to receive yearly interest payments or reinvest them in the fund.
Profit-Sharing	HR_SS_WP_PROF_DTL	Self Service, Payroll and Compensation, Profit-Sharing Entitlements, Profit-Sharing	View details of their profit-sharing entitlement, including gross and net amounts, payment status, and information about the average profit-sharing amounts.
Submit Fund Release Request	HR_SS_WP_PROF_REQ	Click the Release Request button on the Profit Sharing page.	Request release of profit sharing amount. This page is only available if workers are associated with profit-sharing agreements that have *Company Investment* selected as the investment method.

Related Links

"Viewing Personal Entitlements and Requesting Fund Release *(PeopleSoft HCM 9.2: Human Resources Manage French Profit Sharing)*"

Prerequisites

Workers can access their profit-sharing information only if these criteria are met:

- The agreement status is approved.
- To access the Profit-Sharing Entitlements transaction, these conditions must also be true:
  - These four processes have run successfully: Extract Eligible Employees, Compute Global Fund, Distribute Global Funds, and Process Interest and Payment.
  - The reference period status is approved.

    Administrators change the reference period status to approved after reviewing the results of the processes.

Agreement Information Page

Use the Agreement Information page (HR_SS_WP_AGRT_DTL) to view details of the agreements for which they are eligible.

This includes the agreement type, agreement start and end date, agreement duration, investment methods, and computed global fund. Workers can also view the agreement document from this page.

Navigation

Self Service, Payroll and Compensation, Agreement Personalization, Agreement Information

This page shows the agreement information that was set up on the Define Agreement pages. Workers can't update any fields on this page.

Proposed Investments

This group box lists the investment methods defined for the agreement on the Investment page.

Investment

Lists the investment methods in the agreement definition. Click an investment method to view its details. The information shown varies, depending on the investment method.

Favorite Investment

Indicates the default investment method. This is how a worker's funds are invested, unless the worker selects another investment method.

Computed Global Fund

This group box shows a worker's global fund only if the profit-sharing processes have been run for the reference period and the reference period status is approved.

From Date and Thru Date (through date)

The start and end dates of the reference period.

Global Fund Amount

Displays the total global fund. This amount is calculated by the Compute Global Fund process, using the formulas defined on the Define Agreement - Computation page.

View Formula

Click to view the formula that was used to calculate the global fund. The system displays the formula comments entered on the Formula Comments page.

Personalize Agreement

Click to access the Personalize Agreement Options page, where workers can select the following for each reference period of the agreement:

- The investment method.
- How interest is paid (for profit-sharing agreements with *Company Investment* as the investment method).

Workers can't change this information after the personalization date defined for the reference period. If a worker receives a payment or a transfer is completed before the personalization

	deadline, the system doesn't allow them to update the agreement settings after this payment or transfer date. If a personalization date is not defined, a worker can't personalize an agreement if the reference period status is approved.
View Agreement Legal Document	Click to display the agreement document.

Personalize Agreement Options Page

Use the Personalize Agreement Options page (HR_SS_WP_AGRT_PRS) to select an investment method for their funds.

For profit-sharing agreements with Company Investment as the investment method, workers can also select whether to receive yearly interest payments or reinvest them in the fund.

Navigation

Click the Personalize Agreement link on the Agreement Information page.

Personalize Interest Option

This group box appears only for profit-sharing agreements with *Company Investment* selected as the investment method.

Interest To Be Paid	The system displays the default method for handling interest payments, as defined in the agreement. Workers can override the default option for each reference period. Options are: *Immediate:* To receive interest payments once a year. *Re-Invest:* To reinvest interest payments in the worker's profit-sharing fund. The interest is added to the worker's individual fund, which generates further interest the next year.

Personalize Investment Option

This group box displays the default investment methods that were selected for the agreement on the Define Agreement - Investment page.

Investment	If multiple investment methods are defined for an agreement, workers can select the investment method for their fund. Workers can select only from the methods defined for the agreement on the Investment page. Workers who are leaving the organization select *Transfer to new comp/fin orga.* to identify the organization to which the funds are transferred.

Profit-Sharing Page

Use the Profit-Sharing page (HR_SS_WP_PROF_DTL) to view details of their profit-sharing entitlement, including gross and net amounts, payment status, and information about the average profit-sharing amounts.

Navigation

Self Service, Payroll and Compensation, Profit-Sharing Entitlements, Profit-Sharing

This page displays a worker's fund and interest amounts, which are calculated by the Distribute Global Fund and Process Interest and Payment processes. The fields on this page are the same as those displayed using the Personal Entitlements component in PeopleSoft HCM.

See "Viewing Personal Entitlements and Requesting Fund Release *(PeopleSoft HCM 9.2: Human Resources Manage French Profit Sharing)*".

Release Request	Click to request the release of funds. This button appears only when there is a profit-sharing agreement associated with the worker.

Submit Fund Release Request Page

Use the Submit Fund Release Request page (HR_SS_WP_PROF_REQ) to request release of profit sharing amount.

This page is only available if workers are associated with profit-sharing agreements that have Company Investment selected as the investment method.

Navigation

Click the Release Request button on the Profit Sharing page.

Submitted Requests

Displays details of requests previously submitted by the worker.

New Request

Workers use this group box to request fund release in the following situations:

- Before the end of the unavailability period, workers can request the early release of funds in certain situations.

  Workers select the event that enables them to request early release.

- After the end of the unavailability period, workers can request release without conditions.

  To do this, they select *Available* in theEvent field.

Requests are submitted to the compensation administrator for approval. Workers receive emails when the administrator approves or rejects the requests.

See "Viewing Personal Entitlements and Requesting Fund Release *(PeopleSoft HCM 9.2: Human Resources Manage French Profit Sharing)*".

