PeopleSoft HR 9.1 PeopleBook: Administer Compensation

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PeopleSoft HR Administer Compensation Preface

This preface discusses:

- PeopleSoft Products.
- PeopleSoft HCM Application Fundamentals.
- Common elements in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft HR Administer Compensation.

PeopleSoft Application Fundamentals

The *PeopleSoft HR 9.1 PeopleBook: Administer Compensation* provides implementation and processing information for your PeopleSoft HR Administer Compensation system. Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HCM product line. No matter which HCM products you are implementing, you should become familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM Application Fundamentals Preface"

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Common Elements in This PeopleBook

Frequency
Enables you to select a frequency (hourly, daily, monthly, annually, and so on) in which to express the compensation rate.

Base Pay
Pay for a regularly assigned workweek. A pay component that is included in the job compensation rate calculation. For example, an employee's base compensation package may be made up of the following components: base pay, cost of living, child-care cost, and commuting cost.

Compensation Package
All of the base and non-base pay components on a job row.

Job Code
An ID for a job as defined on the Job Code table.

Job Code Component
A pay component assigned to a job code. A pay component is defined by associating a rate code with a job code on the Default Compensation page or the Non-Base Compensation page of the Job Code table.

Job Compensation Rate
The compensation rate of the corresponding job row.

Non-Base Pay	A pay component that is used by Payroll only in paysheet calculation. It is not included in the job comp rate calculation. For example, non-base pay can be set up for additional work, holiday pay, bonuses, and so on.
Pay Component	A row in a compensation record that builds the compensation packages in that record.
Rate Code	The ID of a pay component. It defines a rate of pay. Rate Code represents pay components on pages and when configuring compensation packages in a compensation record. Rate Code is set up in the Comp Rate Code (compensation rate code) table.
Rate Code Group	A number of pay components (represented by rate codes) that are bundled into a subset of a compensation package. The rate code group is used to calculate percentage-based components that do not apply the percentage to all pay components in the compensation package. Rate code groups are set up on the Rate Code Groups page.
Rate Code Type	Determines how the monetary value of a rate code is calculated. The compensation rate code type is defined on the Comp Rate Code table. Valid values are Flat Amount, Hourly Rate + Flat Amount, Hourly Rate, Percent, and Points.
Rate Matrix	A matrix that is associated with a rate code, which applies rules and formulas to determine the amount or rate for a specific employee.
Rules-Driven Pay Component	A pay component that uses rules to determine the appropriate rate code to assign to an employee. Rules are set up in the Comp Rate Code Rules component.
Salary Step Component	A pay component that is assigned to a salary step by entering the corresponding rate code on the Salary Step Components page.
Seniority Pay	A premium that is paid for the length of time that an employee has worked for an organization.
Seniority Pay Component	A pay component that has a rate code with the seniority rate code class (SENPAY). This class is provided by PeopleSoft and is assigned on the Comp Rate Table page. You use it to access the seniority pay functionality.
Seniority Rate Code	A rate code associated with the seniority rate code class (SENPAY). This class is provided by PeopleSoft and is assigned on the Comp Rate Code Table page. You set up levels of pay increase for these codes on the Seniority Pay page of the Comp Rate Code component.

Chapter 1

Getting Started with Administer Compensation

This chapter discusses:

- Administer Compensation business processes.
- Administer Compensation implementation.

Administer Compensation Overview

With Administer Compensation functionality, you define pay components to determine employee compensation. You can associate pay components with customized rules that use Job record fields to calculate compensation variables consistently throughout your organization.

Pay components might include regular pay, additional pay for work under hazardous conditions, pay for work in a different job, or pay for an equipment allowance. A pay component could be an hourly rate, a flat amount, or an addition to the base hourly rate.

With Administer Compensation, you can:

- Figure a percentage of a worker's base pay and use it as a pay component.
- Compensate workers using salary points.
- Create a unique compensation package for each employee.

Administer Compensation Business Processes

Administer Compensation provides the following business processes:

- Defining Compensation Rates and Rules-Driven Component Defaulting.

  Set up flexible defaulting rules that automatically update an employee's compensation package based on field values other than job code and salary step code.

- Administering Seniority Pay.

  Add and update seniority rate codes in employees' compensation pages. Seniority rate codes enable you to pay a premium for seniority.

- Refreshing Employee Compensation Information.

  Update employee compensation packages based on current values in the system, replacing manual changes with new default values.

- Using Market Pay.

  Capture market pay data to represent the conclusion of a job valuation or market pricing business processes.

We discuss these business processes in the business process chapters in this PeopleBook.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Market Pay"

Administer Compensation Integrations

HR integrates with all the PeopleSoft HCM applications, with other PeopleSoft applications, and with third-party applications.

HR shared tables are available to many PeopleSoft HCM applications. In addition, data in many HR tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

The Administer Compensation business process integrates with the following PeopleSoft HCM applications:

- PeopleSoft HR Administer Workforce.
- PeopleSoft HR Manage Base Compensation and Budgeting.
- PeopleSoft HR Manage Positions.
- PeopleSoft eCompensation Manger Desktop.

We discuss integration considerations in this PeopleBook.

Administer Compensation Implementation

Administer Compensation also provides component interfaces to help you load data from your existing system into Administer Compensation tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists the components that have a setup component interface:

Component	***Component Interface***	***References***
COMP_RATECD_TBL	CI_COMP_RATECD_TBL	See Chapter 2, "Setting Up Administer Compensation," Setting Up Rate Codes, page 6.

Component	***Component Interface***	***References***
JOB_CODE_TBL	CI_JOB_CODE_TBL	See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up Jobs," Defining Job Subfunction and Job Function Codes.
SALARY_GRADE_TBL	SALARY_GRADE_TBL	See *PeopleSoft HR 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps.

Other Sources of Information

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.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM Application Fundamentals Preface"

PeopleTools 8.52: Component Interfaces PeopleBook

PeopleTools 8.52: Setup Manager PeopleBook

Chapter 2

Setting Up Administer Compensation

This chapter provides an overview of Administer Compensation, and discusses how to:

- Set up rate codes.
- Define groups of rate codes.

Understanding Administer Compensation

In the following overview, the second step—defining rate codes—is required. The other remaining steps are optional, but they provide invaluable functionality for rate code use.

To administer compensation:

1. Define rate code classes on the Rate Code Classes page.
2. Define rate codes on the Comp Rate Code Table page.
3. Define rate code groups on the Rate Code Groups page and enable the use of rate code groups in the system.
4. Associate rate codes with salary steps on the Salary Step Components page of the Salary Grade component.
5. Define special rate code defaulting rules using the Rate Code Defaulting Rules component.
6. Associate rate codes with job codes, positions, and worker job records.
7. Compensate workers by using salary points:
    a. Select the Salary Points check box on the Options page of the Installation component.
    b. Set up the Salary Points monetary value on the Default Settings page of the Company component.
    c. Associate the point value (an integer) with rate codes on:
        – The Salary Step Components page of the Salary Grade component.
        – The Default Compensation page and the Non-Base Compensation page of the Job Code component.
        – The Compensation page of the Job Data component.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs"

PeopleSoft HR 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting"

PeopleSoft Enterprise HR 9.1 PeopleBook: Manage Positions, "Setting Up Positions"

Setting Up Rate Codes

To set up rate codes, use the Rate Code Class Table (RATECD_CLASS_TBL) and Comp Rate Code Table (COMP_RATECD_TBL) components. Use the CI_COMP_RATECD_TBL component interface to load the data into the tables for this component interface.

This section provides an overview of creating seniority rate codes, lists the pages used to set up rate codes, and discusses how to:

- Create rate code classes.
- Define rate codes.
- Associate seniority rate codes with compensation increases.
- View defaulting rules associated with compensation rate codes.

Note. If you are assigning rate code classes to rate codes, you must define rate code classes before creating rate codes.

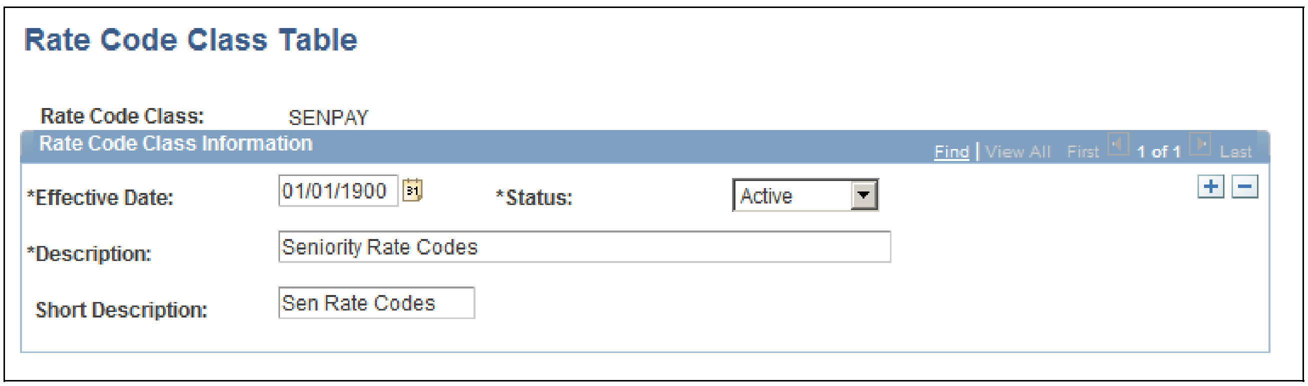
Pages Used to Set Up Rate Codes

Page Name	***Definition Name***	***Navigation***	***Usage***
Rate Code Class Table	RATECD_CLASS_TBL	Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Class Table	Create rate code classes.
Comp Rate Code Table (compensation rate code table)	COMP_RATECD_TBL	Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Comp Rate Code Table	Define rate codes.

Page Name	***Definition Name***	***Navigation***	***Usage***
Comp Rate Code Table - Seniority Pay	SENIORITY_PAY	Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Seniority Pay	Associate a seniority rate code with: • Levels of compensation increases. • One or more groups that you define using Group Build.
Comp Rate Code Table - Combination Rules	COMP_RATECD_RULES	Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Combination Rules	View defaulting rules associated with a compensation rate code.

Creating Rate Code Classes

Access the Rate Code Class Table page (Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Class Table).



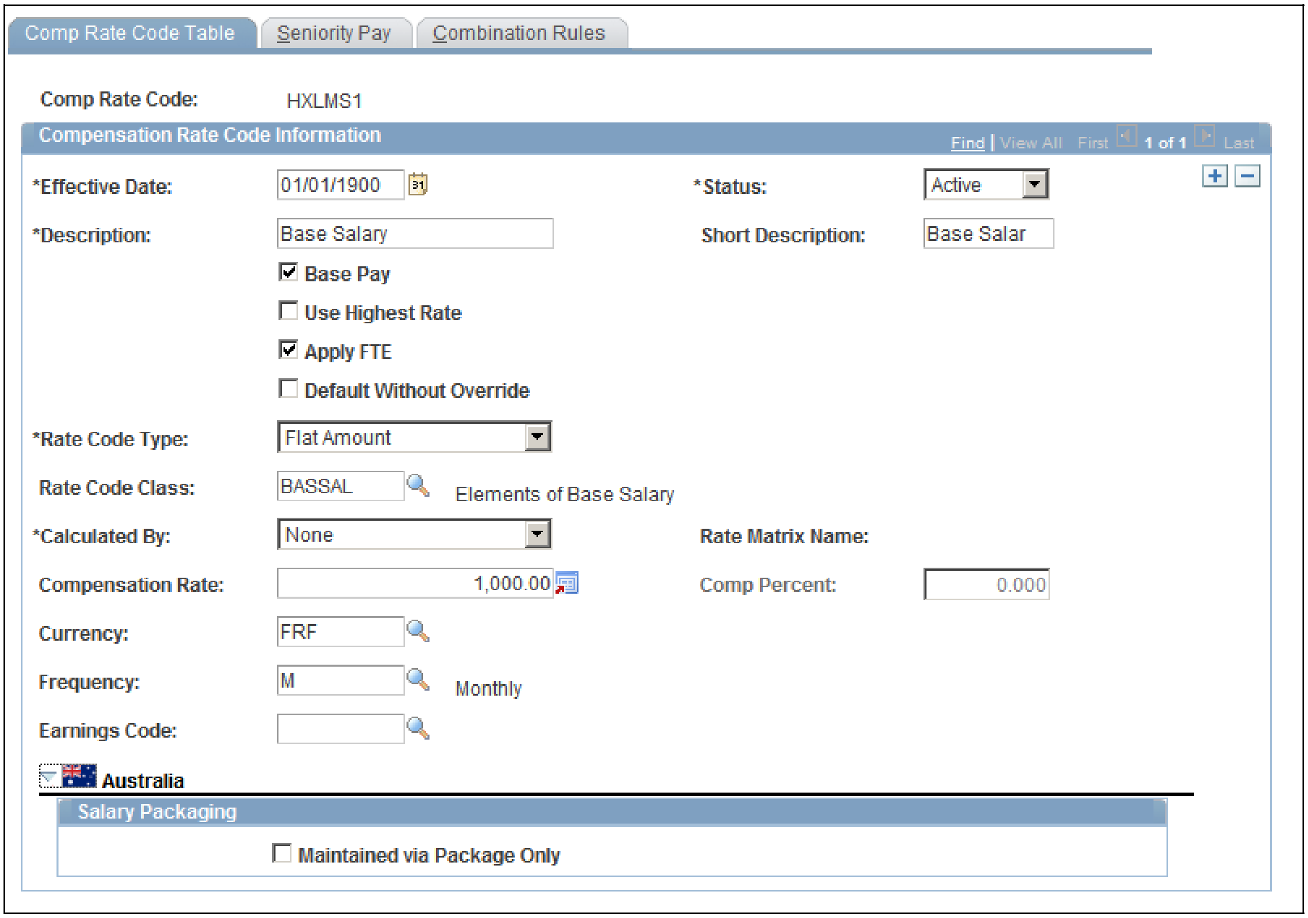
Rate Code Class Table page

You can associate individual rate codes with rate code classes. These classes are used as search criteria on rate code search pages throughout the system. After you create rate code classes on this page, you assign them to rate codes on the Comp Rate Code Table page.

The predefined rate class SENPAY enables you to bundle rate codes used to administer seniority pay to workers.

Defining Rate Codes

Access the Comp Rate Code Table page (Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Comp Rate Code Table).



Comp Rate Code Table page

Use Highest Rate

Select to use the highest rate of pay for this rate code. Use this option when a worker is temporarily placed in another job that is paid at a higher rate. This field does not affect human resources processing.

For Payroll for North America: When you assign rate code at the job level, you can enter a compensation rate that differs from the rate defined on the rate code table. If you deselect this check box, the rate that you specify at the job level overrides this rate.

Apply FTE (apply full-time equivalency)

Select for the rate code to be calculated as part of FTE. FTE is the percentage of full time that a worker normally works in the corresponding job. Full time is defined in the Standard Hours and Standard Work Period fields on the Salary Plan table. Alternatively, it can be defined in the default Standard Hours and Standard Work Period fields on the Installation table.

For Payroll for North America: Select to include full time equivalency in the job in the calculation of a base pay rate. You can select this check box only when the rate code type is Flat Amount or Hourly Rate. This check box does not apply to non-base-pay rates; it is unavailable for entry if you deselect the Base Pay check box.

Default Without Override

Select to ensure that compensation rate of the workers assigned to this rate code cannot be manually updated on the Compensation page of the Job Data component. You must select this check box for seniority rate codes.

Note. We do not recommend deselecting this check box for a rate code used as an absorbable premium on the Salary Plan table after the rate code has been added to worker compensation packages.

Rate Code Type

Select a compensation rate type. Depending on the type you select, certain fields become available for entry. Values are:

- *Flat Amount:* A fixed (or flat) amount.
- *Hourly Rate + Flat Amount:* A flat amount that is paid in addition to the hourly rate that is specified on a worker's timesheet. Enter the flat amount in the Compensation Rate field. This type cannot be a base-pay component.
- *Hourly Rate:* An hourly rate of pay.
- *Percent:* A percentage for use in defining compensation.
- *Points:* This type of rate code is paid using salary points instead of currency. The monetary value of each point is set up on the Company Table page.

Note. To use points, select the Salary Points check box on the Installation Table - HRMS Options page.

See *PeopleSoft HCM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Installing PeopleSoft HCM," Setting Up Implementation Defaults.

Rate Code Class

Select a rate code class to associate with the rate code. Values include:

- *Elements of Base Salary (BASSAL):* Used in salary forecasting.
- *Defined Range Rate Codes (DFRPAY):* Used for pay components that are based on grade ranges within salary plans.
- *Regular Bonus (REGBON):* Used in salary forecasting.
- *Seniority (SENPAY):* Enables you to create seniority pay components, associate them with levels of pay increase, and update them according to changing seniority status.

Note. If you have created additional rate code classes, you can select one of the delivered values described previously or one of the values you created.

Calculated By

Select a value to determine how the rate for this rate code will be derived. Values are:

- *None*: The rate on the rate code table itself is used.

  This value uses the current functionality.

- *Rate Matrix*: The value will be derived dynamically from a rate matrix associated with the rate code.

  The rate matrix may have multiple criteria that determine different rates to be used.

Note. You can switch between *None* and *Rate Matrix* without having to create a new effective-dated row.

Rate Matrix

Select the specific rate matrix to be used.

This field becomes available when the *Rate Matrix* value is selected in the Calculated By field.

Important! You can only select a rate matrix whose output is compatible with the definition of the rate code. For example, if the rate code has a rate code type of Flat, (which implies a dollar amount), then the rate matrix must have an output of type amount, it cannot have an output that is a percentage, or a string of characters.

When selecting a matrix, PeopleCode makes sure that it returns a result that matches the Rate Code Type. For example, DEFAULT_AMOUNT and AMOUNT are Flat Amount result types that are valid for a Rate Code with a type of Flat Amount. If the only Result ID specified was DEFAULT_PERCENTAGE, the system would display an error message because it is not valid. To resolve this issue, you would need to add another Result ID to the Matrix setup with a type of DEFAULT_AMOUNT or AMOUNT.

See *PeopleSoft HR 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Using Configurable Matrices."

Comp Percent (compensation percentage)

Enter the percentage that will be applied to all base pay components, or a rate code group when new compensation rates for a worker are being derived.

Compensation Rate

Enter the standard compensation rate for this rate code. .

This field is available when you select the value of *None* in the Calculated By field.

Currency

Enter the currency for each value pertaining to the Calculated By field. .

Frequency

Select a compensation frequency. You cannot select Hourly if the rate code type is Flat Amount. You *must* select Hourly if the rate code type is Hourly or Flat Amount & Hourly.

Earnings Code If you use PeopleSoft Payroll for North America and enter an earnings code here for a nonbase pay rate code, the system automatically enters the earnings code when you select the comp rate code on the paysheet.

(AUS) Australia

When implementing PeopleSoft Salary Packaging for Australia, use this page to define and review the compensation rate codes you will use to package your workers. Compensation rate codes represent the IDs that you use for your pay components throughout your Salary Packaging system.

When defining your salary package components and additional components, you can link them to compensation rate codes to help you enter expenditures for the appropriate components. If you link compensation rate codes to salary package components, you must have a unique rate code for each package component or additional component (identified as an expense payroll type). This enables you to reconcile the package expenditure.

Maintained via Package Only Select to create a link between a salary package component and the compensation rate code.

If you select this check box, a warning message appears if you manually change a worker's compensation rate code.

This check box, combined with other information on the worker's Job record, is used to maintain salary package integrity.

Using Rate Codes – Example

If a worker is assigned a rate code that is matrix-based, there will only be an initial evaluation of the rate matrix to determine the compensation rate for that rate code. This is consistent with current rules for rate code management. Over time, worker information may change that could warrant the assignment of a different rate from the matrix. However, the system will not do this automatically. The only way to get rates reevaluated automatically is by running one of the existing batch processes (CMPnnn). In general most of the these batch processes replicate the processing done by the Default Pay Components and the Calculate Compensation buttons on Job compensation page. If someone manually added a Rate Matrix based rate code, and the "Default Without Override" option is not selected, that rate code will never get refreshed by any process or by pushing the button. If an update is needed, it must be done manually.

See Also

PeopleSoft HR 9.1 PeopleBook: Administer Salary Packaging, "Understanding Administer Salary Packaging"

Creating Seniority Rate Codes

To administer seniority pay, you must create seniority rate codes.

To create a seniority rate code:

1. Associate a rate code with the predefined seniority rate code class SENPAY.

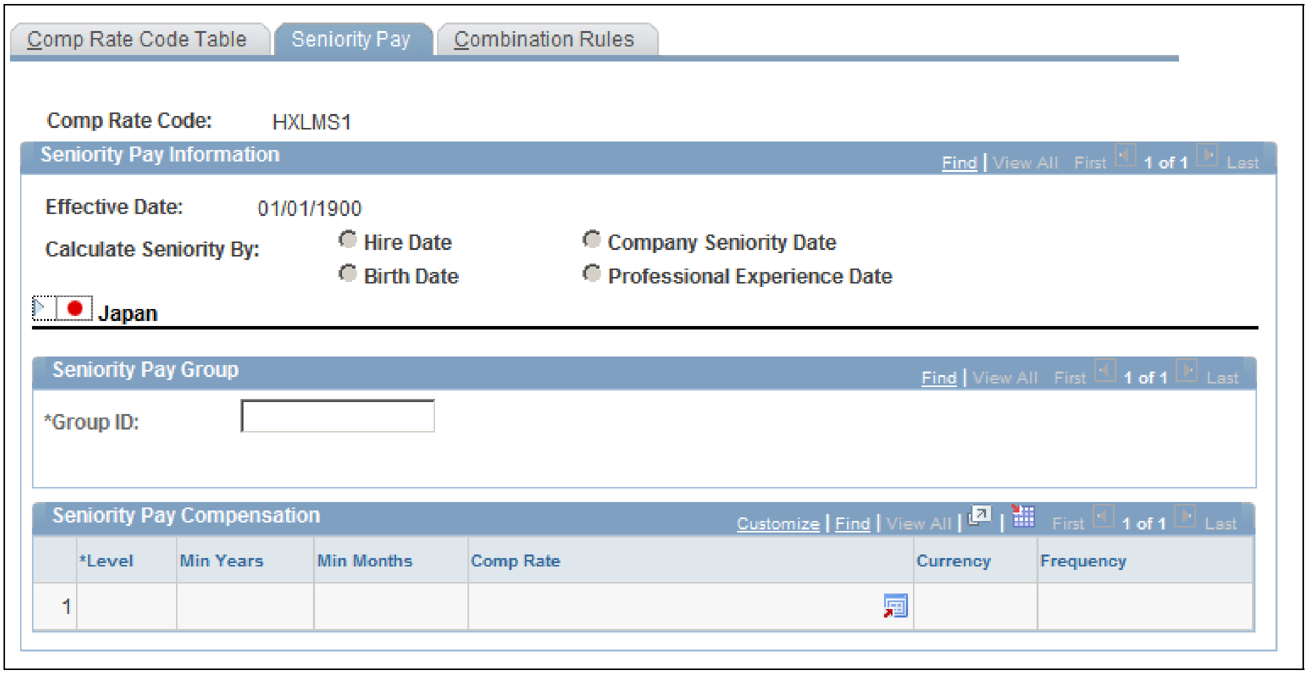
2. Associate the rate code with levels of seniority compensation increase.

3. (Optional) Associate the rate code with one or more groups that you define using Group Build.

Important! You cannot associate configurable rate matrices to seniority rate codes.

Associating Seniority Rate Codes with Compensation Increases

Access the Comp Rate Code Table - Seniority Pay page (Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Seniority Pay).



Comp Rate Code Table - Seniority Pay page

Calculate Seniority By

Select the type of date on which to base seniority. Values are:

- *Hire Date.*
- *Company Seniority Date:* This date tracks the amount of time that a worker has been with a particular company in the organization.

  The default date is the hire date, but you can override it.
- *Birth Date.*
- *Professional Experience Date:* The date that the worker began working in a job requiring skills that are directly related to the current position.

(JPN) Japan

Educ Lvl-Adjsted Birth Date (education level-adjusted birth date)	Select to calculate education level age-related pay, a type of seniority pay commonly paid by Japanese organizations.

Seniority Pay Group

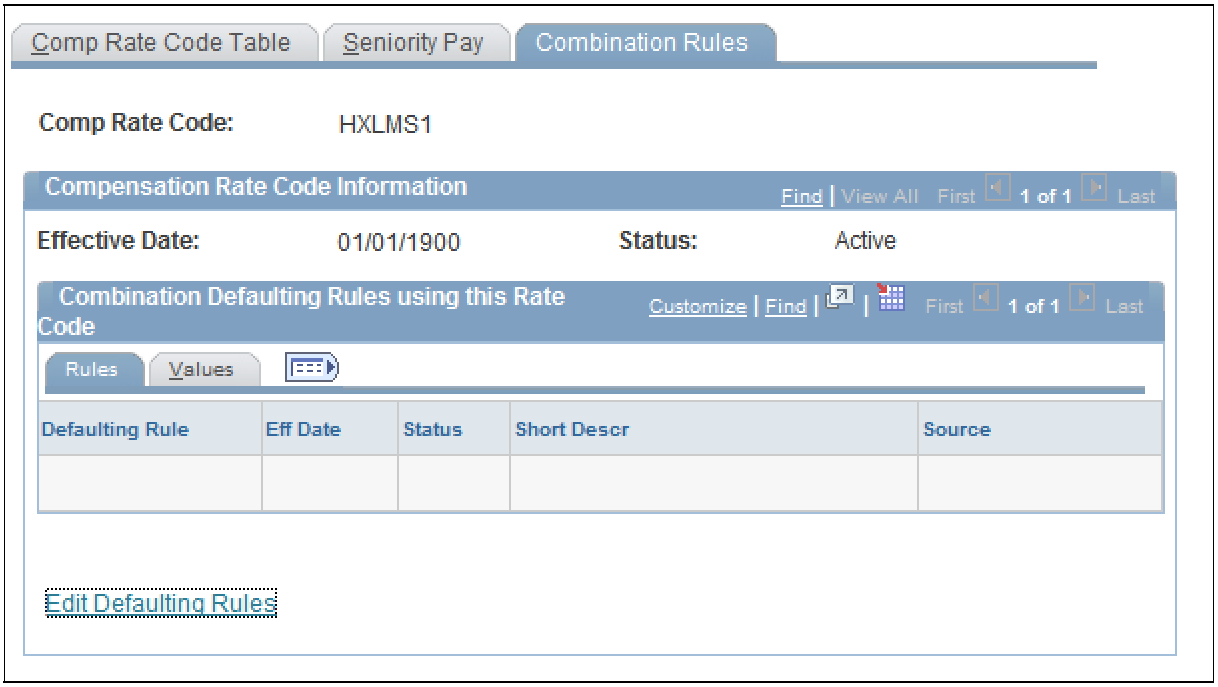
Group ID	Enter one or more group IDs to associate the seniority rate code with groups that you define using the Group Build business process. The system issues a warning if the ID that you enter is associated with another seniority rate code. When you move out of this field, the name of the group ID appears. **Note.** If you do not enter a group ID, the system associates the seniority rate code with every worker's compensation package.

Seniority Pay Compensation

Level	Enter a seniority level
Min. Years (minimum years) and **Min. Months** (minimum months)	Enter the minimum years and months of service that are necessary to qualify for the seniority level. If you enter both Min. Years and Min. Months, the system uses the total of those years and months in its calculation.
Comp Rate (compensation rate)	This option appears if you select Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount as the rate code type. Enter a compensation rate to associate with this seniority level.
Comp Percent (compensation percent)	This option appears if you select Percent as the rate code type. Enter the compensation percentage to associate with this seniority level.
Points	This option appears if you select Points as the rate code type. Enter the salary points to associate with this seniority level.

Viewing Defaulting Rules Associated with Compensation Rate Codes

Access the Comp Rate Code Table - Combination Rules page (Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Combination Rules).



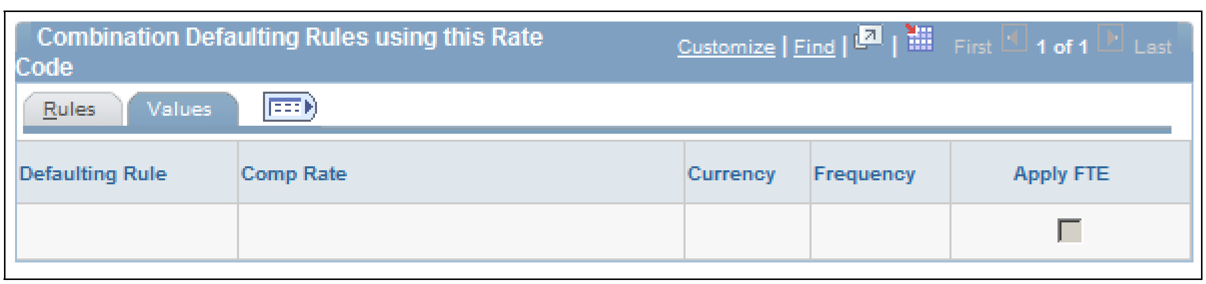
Comp Rate Code Table page - Combination Rules tab

This page displays the combination defaulting rules that use this rate code.

Edit Defaulting Rules Click to access the Rate Code Defaulting Rules - Rate Codes page, where you edit the information for the defaulting rules.

Values tab

Access the Values tab.



Combination Rules page – Values tab

This page displays the compensation rate, currency and frequency as defined on the defaulting rule.

Note. This page only displays *combination* defaulting rules, not salary step and job code defaulting rules.

Defining Groups of Rate Codes

To set up rate code groups, use the Rate Code Groups (RATE_CODE_GROUPS) component.

This section provides overviews of rate code groups and discusses how to create groups of rate codes.

Understanding Rate Code Groups

After you have defined rate codes, you can optionally set up rate code groups. Using rate code groups, you can:

- Be specific when calculating percentage-based pay components as part of your worker compensation packages.

  For example, a worker's base compensation package may be made up of the following components: base pay, cost of living, child-care cost, and commuting cost.

- Calculate a bonus amount based only on certain parts of a worker's compensation package, as opposed to the entire package.

  You may want to do this if a percentage-based bonus is part of a worker's compensation.

- Bundle base-pay components that you want the system to use in its calculation, excluding other pay components.

Note. Before you can use groups of rate codes, you must select the Use Rate Code Groups check box on the HRMS Options page of the Installation component.

Understanding Percentages and Rate Code Groups

You can associate a rate code group with a percentage rate code. If you do this, the system applies that percentage to all the rates in the rate code group; it adds the total to a worker's compensation package. If you decide not to use rate code groups, you can calculate percentage rates using a worker's entire base-pay compensation package.

When you implement a pay increase for a worker, you can specify that the worker is to receive a percentage increase of base pay, as defined in the rate code group. When the system calculates the value of the increase, its calculation is based on the different pay rates that are associated with the base-pay rate group.

You can associate a rate code group with a percentage rate code:

- In a salary step on the Salary Step Components page of the Salary Grade component.
- With a job code on the Default Compensation and Non-Base Compensation pages of the Job Code component.
- At the worker level on the Job Data - Compensation page.

Page Used to Create Groups of Rate Codes

Page Name	***Definition Name***	***Navigation***	***Usage***
Rate Code Groups	COMPRT_GRP_PNL	Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Groups	Create groups of rate codes.

Chapter 3

Defining Compensation Rates and Rules-Driven Component Defaulting

This chapter provides an overview of rules-driven pay component defaulting and discusses how to:

- Define compensation rates for workers.
- Define rules-driven component defaulting.

Understanding Rules-Driven Component Defaulting

This section discusses rules-driven component defaulting.

You can use rules-driven component defaulting to create flexible defaulting rules for rate codes. This feature enables you to specify default values to use based on certain criteria, such as field values. For example, you can base workers' compensation on their locations.

To set up component defaulting rules:

1. On the Defaulting Options page, select the job data fields that affect compensation in your organization and that you want to have available for use in pay component defaulting rules.
2. In the Rate Code Defaulting Rules component, define pay component defaulting rules by indicating the field values that should result in a rate code change in a worker's compensation package.

For example, you want to set up a rule that bases the default compensation values on a worker's salary plan and location. To do this:

1. On the Defaulting Options page: Select the Location and Salary Plan fields.
2. In the Rate Code Defaulting Rules component:
   a. Define the rule.
   b. Indicate the location and salary plan values that trigger pay component defaulting
   c. Indicate which new rate codes apply.
   d. Save the rule.
3. If the status is set to Active, component defaulting is now in effect.

4. In the Job Data component: Search for the worker and click the Default Pay Components button.

   The system will use the defaulting rules to add new pay components to the worker's compensation record or update the values of existing pay components to the default values.

Note. Since component defaulting is now in effect whenever a worker's job data is changed (such as the salary plan or location), the system will apply these rules.

You can also use the Refresh Employee Compensation process to set the default values for the compensation packages of a defined worker group. When you trigger the component defaulting process, the system updates the compensation record of any worker who meets the criteria established in the defaulting rule.

Rules-driven component defaulting is optional; job code and salary step component defaulting may be sufficient to meet your business requirements. In the Rate Code Defaulting Rules component, you can also view rate code defaulting rules with a rate code source of job code or salary step. However, you must use the Job Code and Salary Grade components to edit them.

Defining Compensation Rates for Workers

Use the CI_JOB_CODE_TBL and SALARY_GRADE_TBL component interfaces to load the data into the tables for these component interfaces.

After you define rate codes (and optional categories such as rate code classes and groups), you can define compensation rates for workers. Defining worker compensation is fully documented in other HCM PeopleBooks, as shown in the table below.

Overview of Steps for Defining Rates of Pay

Associate rate codes with:	***On the:***
Salary steps	Salary Grade Table - Salary Step Components page
Job codes	Job Code Table - Default Compensation and Non-Base Compensation pages
Positions (using the job codes you assign to them)	Position Data component - Description page
Employee records	Job Data component - Compensation page

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up Jobs," Associating Salary Plan Information and Base Pay Rate Codes with a Job Code

PeopleSoft Enterprise HR 9.1 PeopleBook: Manage Positions, "Setting Up Positions," Creating Positions

PeopleSoft HR 9.1 PeopleBook: Administer Workforce, "Increasing the Workforce"

Defining Rules-Driven Component Defaulting

This section lists the pages used to define rules-drive component defaulting and discusses how to:

- Specify fields that should be available when defining component defaulting rules.
- Define component defaulting rules header information.
- Create component defaulting rules criteria.
- Associate values with component defaulting rules criteria.
- Assign rate codes to component defaulting rules.

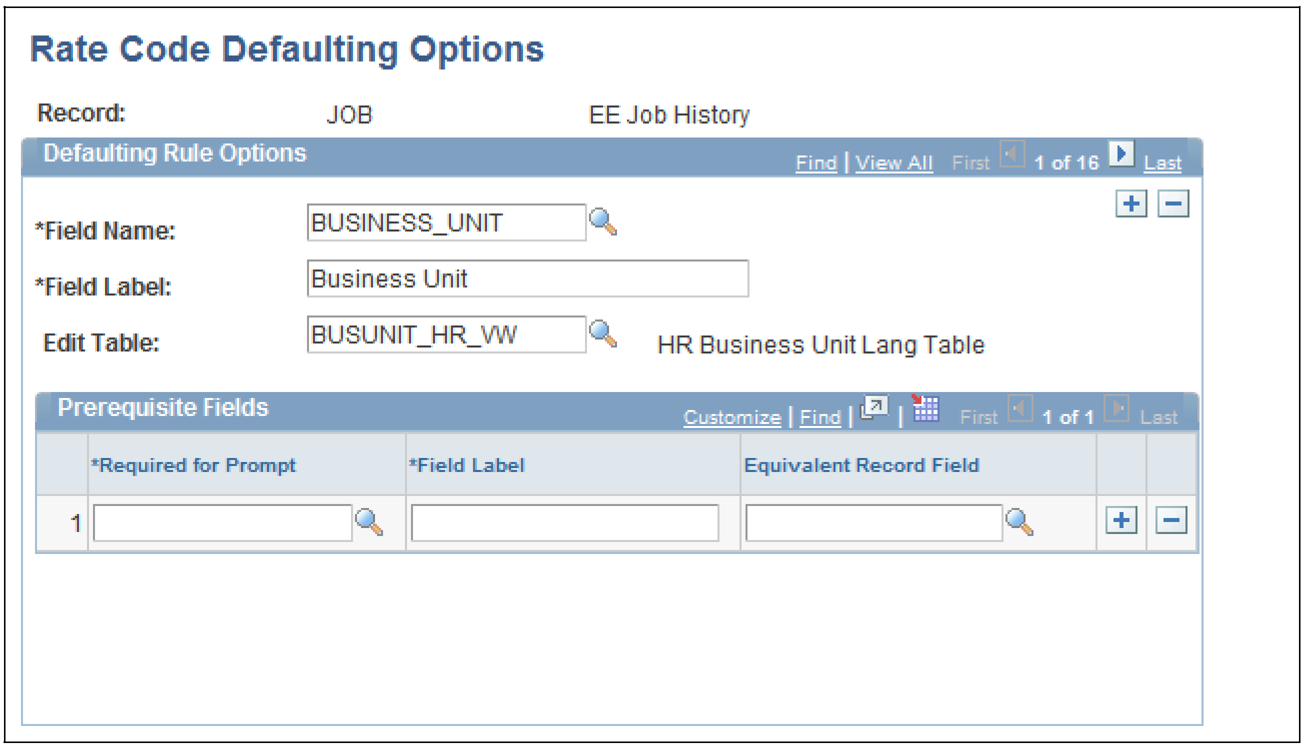
Pages Used to Define Rules-Driven Component Defaulting

Page Name	***Definition Name***	***Navigation***	***Usage***
Rate Code Defaulting Options	CMP_DFLT_OPTIONS	Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Rate Code Defaulting Options, Rate Code Defaulting Options	Specify which Job record fields are available to component defaulting rules.
Definition	CMP_RULE_DEFN	Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Definition	Define component defaulting rule header information.
Criteria	CMP_RULE_CRITERIA	Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Criteria	Create and modify criteria for component defaulting rules.
Values	CMP_RULE_VALUES	Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Values	Specify the values that the fields and operators you selected on the Criteria page should act on.

Page Name	***Definition Name***	***Navigation***	***Usage***
Rate Codes	CMP_RULE_RATECD	Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Rate Codes	Assign rate codes to the component defaulting rules.
Rate Code	WCS_RTCD_DETAILS	Click Details on the Rate Codes page.	View additional information about the compensation rate code.

Specifying Fields That Should Be Available When Defining Component Defaulting Rules

Access the Rate Code Defaulting Options page (Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Options, Rate Code Defaulting Options).



Rate Code Defaulting Options page

Defaulting Rules Options

Field Name and **Field Label** Select the field name that you want to have available for use as criteria for component defaulting rules. After you select a field name, its description appears in Field Label; you can change this description.

Edit Table

Select the field's edit table—that is, the table from which the field is prompted.

Prerequisite Fields

Required for Prompt and **Field Label**

Select the field that prompts for the defaulting rules fields, if required. If you select a field in Required for Prompt, you must select its value on the Values page.

For example, if the defaulting rules field is Department, select *SETID.* (Before you can select a department, you must select the department's setID.) The appropriate values appear in Field Label and Equivalent Record Field when you select the Required for Prompt field. You must then access the Values page to select the department's value (based on its setID).

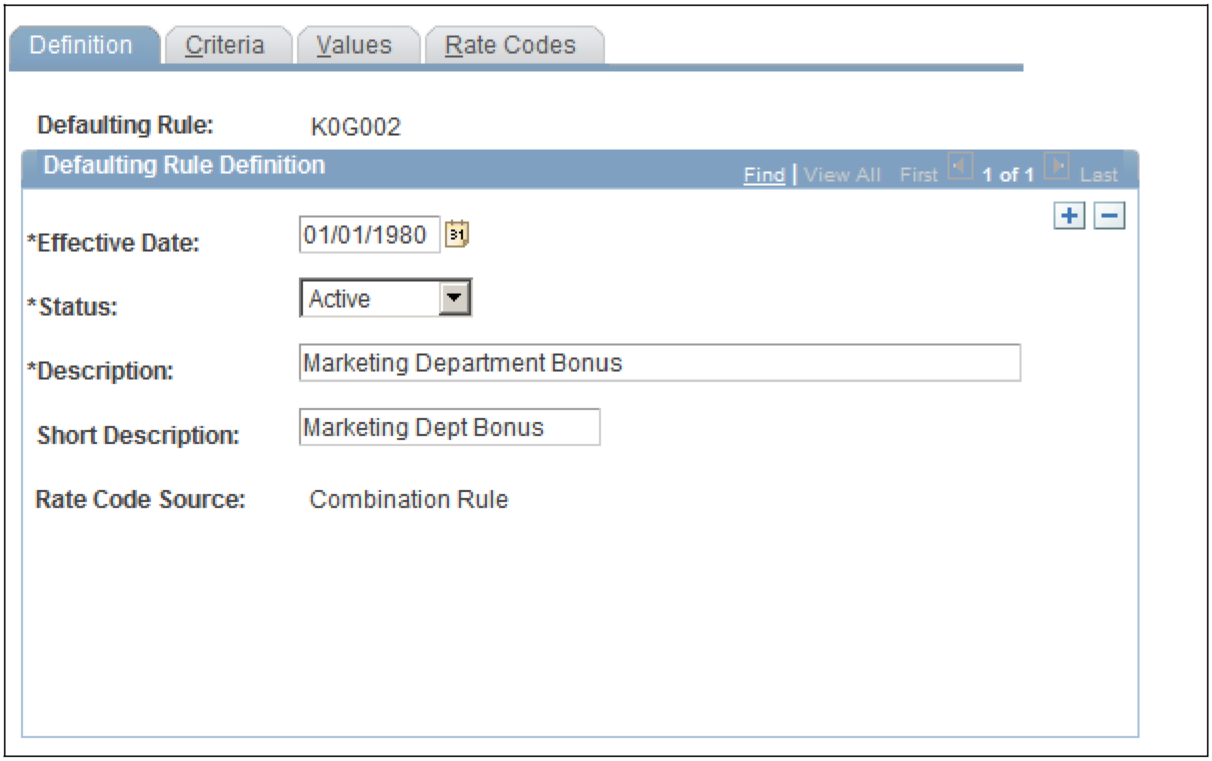
Equivalent Record Field

Select the Required for Prompt field's Job equivalent. For example, the Job equivalent of SETID is SETID_DEPT.

Sometimes the equivalent field is the same as the Required for Prompt field, or there is no equivalent field. If there is no equivalent field, leave this field blank.

Defining Component Defaulting Rules

Access the Definition page (Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Definition).

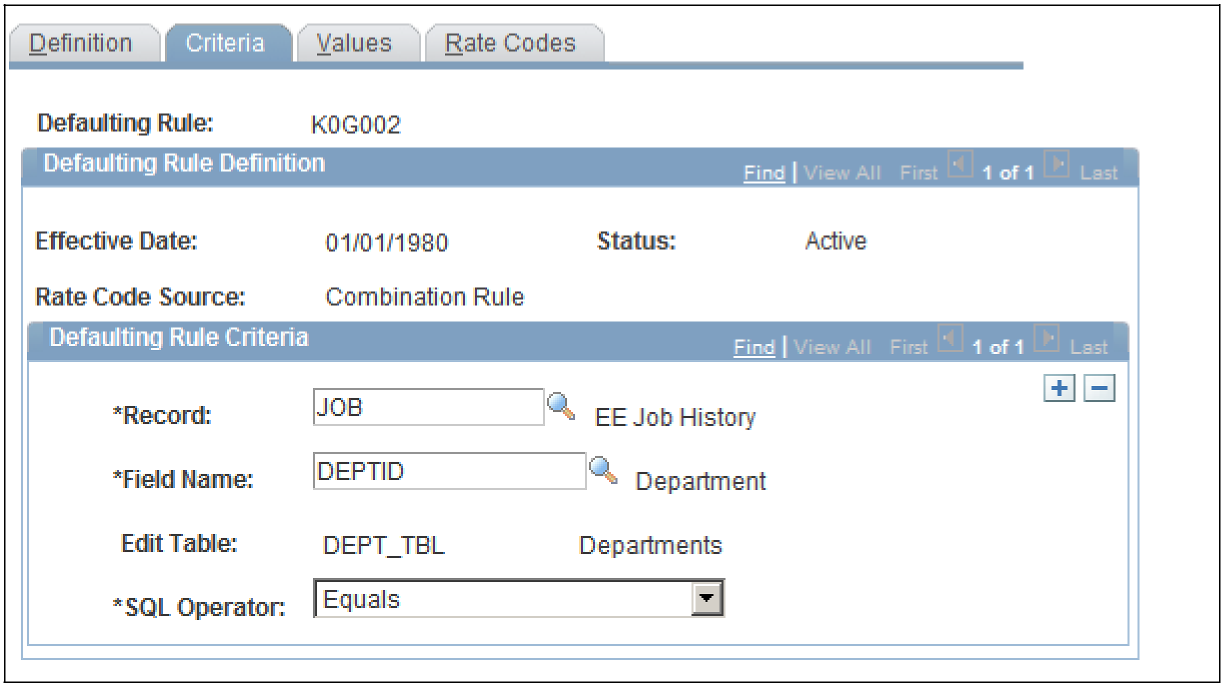


Definition page

Enter a description of the component defaulting rule. All defaulting rules created directly in this component will have the rate code source Combination Rule. You can also view defaulting rules with other rate code sources, such as job code or salary step. Those rules are automatically created when you set up default pay components on those pages.

Creating Component Defaulting Rules Criteria

Access the Criteria page (Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Criteria).



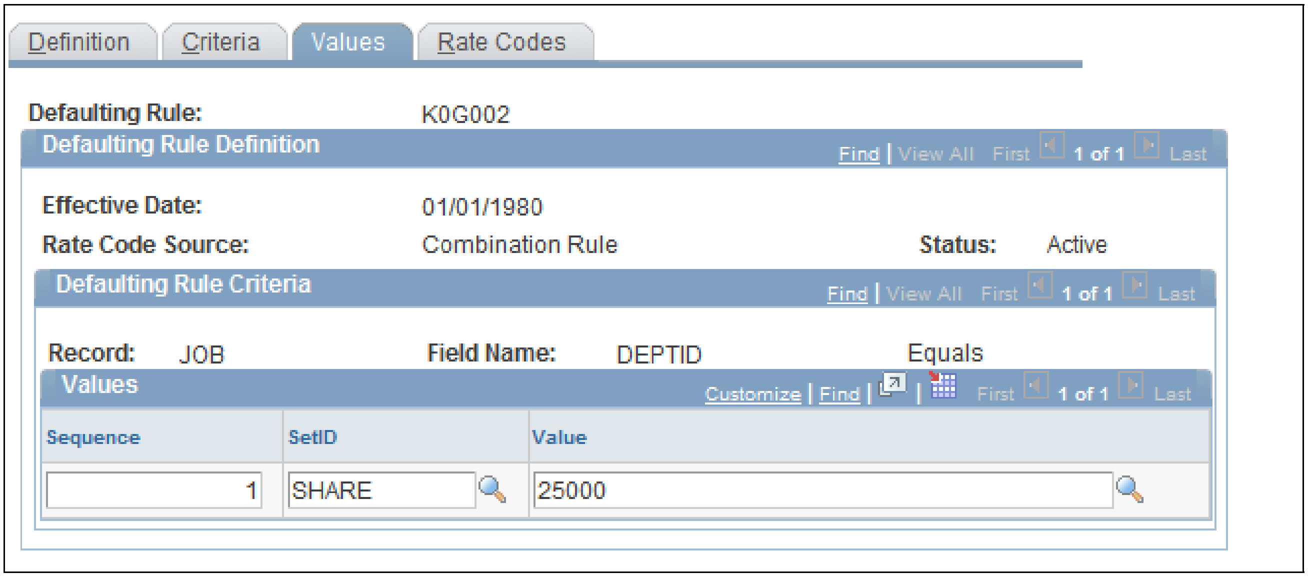
Criteria page

Record, Field Name, and **Edit Table** — Select the record and the name of the field whose value will trigger this rule. The system displays the field's edit table.

SQL Operator — Select the Structured Query Language (SQL) operator that defines the relationship of the rule to the field values that you select on the Values page. For example, select *Equals* if you want the rule to act only on workers who have the field value specified on the Values page.

Associating Values with Component Defaulting Rules Criteria

Access the Values page (Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Values).



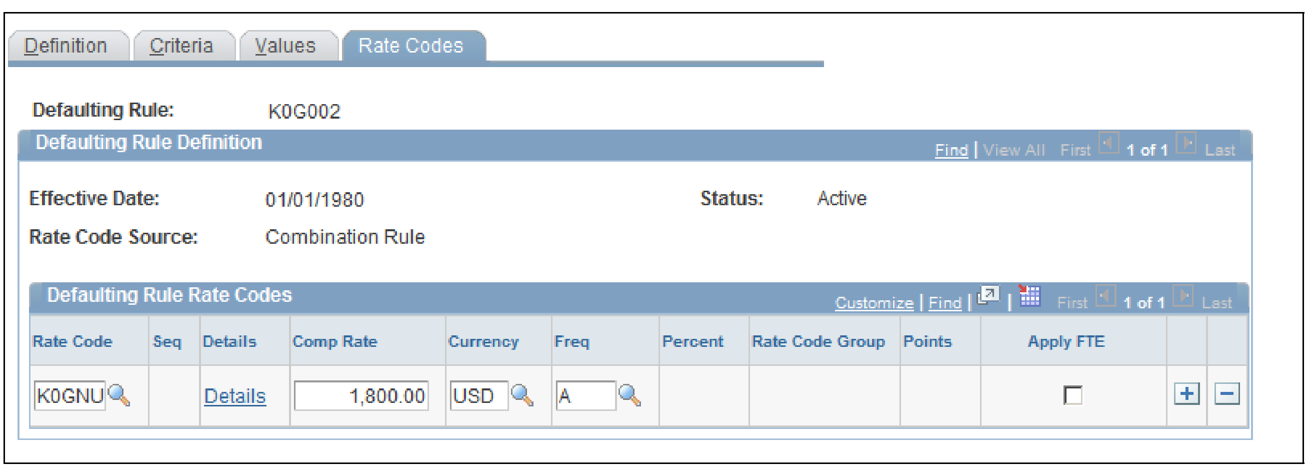
Values page

SetID and **Value**

If a prompt is required for the Value field (that is, Required for Prompt is specified on the Defaulting Options page), select the appropriate prompt value here. For example, select the department's setID in the prompt field and then select the department in the Value field. (You must first use the Defaulting Options page to select department as Field Name and setID as the Required for Prompt field.)

Assigning Rate Codes to Component Defaulting Rules

Access the Rate Codes page (Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Rate Codes).



Rate Codes page

Rate Code

Select the rate code to be used as the default for this defaulting rule.

Details	Click to access the Rate Code page and view additional information about the compensation rate code. If there is a rate matrix associated with the rate code, you can also view the matrix from this page.
Comp Rate (compensation rate)	Enter the compensation rate for this defaulting rate code rule. If the rate code type is *Flat Amount*, *Hourly Rate,* or *Hourly Rate + Flat Amount,* enter a compensation rate for the rate code. **Note.** This field is unavailable if you are using a rate code that has an associated rate matrix. In that case, the compensation rate is determined dynamically based on the rate matrix and will be updated directly on the worker's job compensation record when the defaulting rule is triggered.

Chapter 4

Using Wage Progression with Administer Compensation

This chapter provides an overview of the wage progression functionality and discusses how to set up and use wage progression with Administer Compensation.

Understanding Wage Progression and Administer Compensation

Automatic step progression is a standard practice in the manufacturing industry and retail industry of providing new workers with increases based on the passage of time or actual time worked. The definition of actual time worked will vary by bargaining agreement. The formulas used for calculating increases also differ by agreement.

The wage progression feature provides the ability to define a wage progression rule that captures the advancement criteria and step calculations. You can then generate the step details reflecting a grade pay range. Batch processes gather and analyze worker data to determine when a worker is ready for advancement and will insert the appropriate Job and Compensation rows reflecting the new step and pay rate.

See Also

Chapter 4, "Using Wage Progression with Administer Compensation," page 27

Prerequisites

In order to use the wage progression feature, you must:

- Use HR as your core system of record for worker information.

  The worker must be assigned a bargaining unit, labor agreement, and a salary plan that includes a wage progression rule.

- Select Multi-Step Grade option on the Installation Table - HRMS Options page (Set Up HRMS, Install, Installation Table, HRMS Options).

- Determine if your wage progression rules require time worked data.

  If yes and if you use PeopleSoft Payroll for North America, then associate special accumulators with all the appropriate earnings codes. Earning codes in the accumulators must be defined to match the wage progression rule's time requirements. You could alternatively create integrations to provide time data from other systems or enter the time manually on the Review Wage Progression page.

See Also

PeopleSoft Payroll for North America 9.1 PeopleBook, "Setting Up the Payroll Process," Establishing Special Accumulator Codes

PeopleSoft Payroll for North America 9.1 PeopleBook, "Defining Earnings Codes and Earnings Programs"

Setting Up and Using Wage Progression with Administer Compensation

To set up and use wage progression, use the Define Salary Grades (SALARY_GRADE_TBL) component.

Important! You will not use the Categorization Defaults page in the Define Salary Grades component because the labor agreement parameters do not apply. To associate a salary plan and grade to one or more labor agreements, use the Job Codes page of the Labor Agreement component (Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Labor Agreement).

This section discusses how to:

- Define a salary plan with a wage progression.
- Define wage progression rules.
- Apply wage progression rules to salary plans.

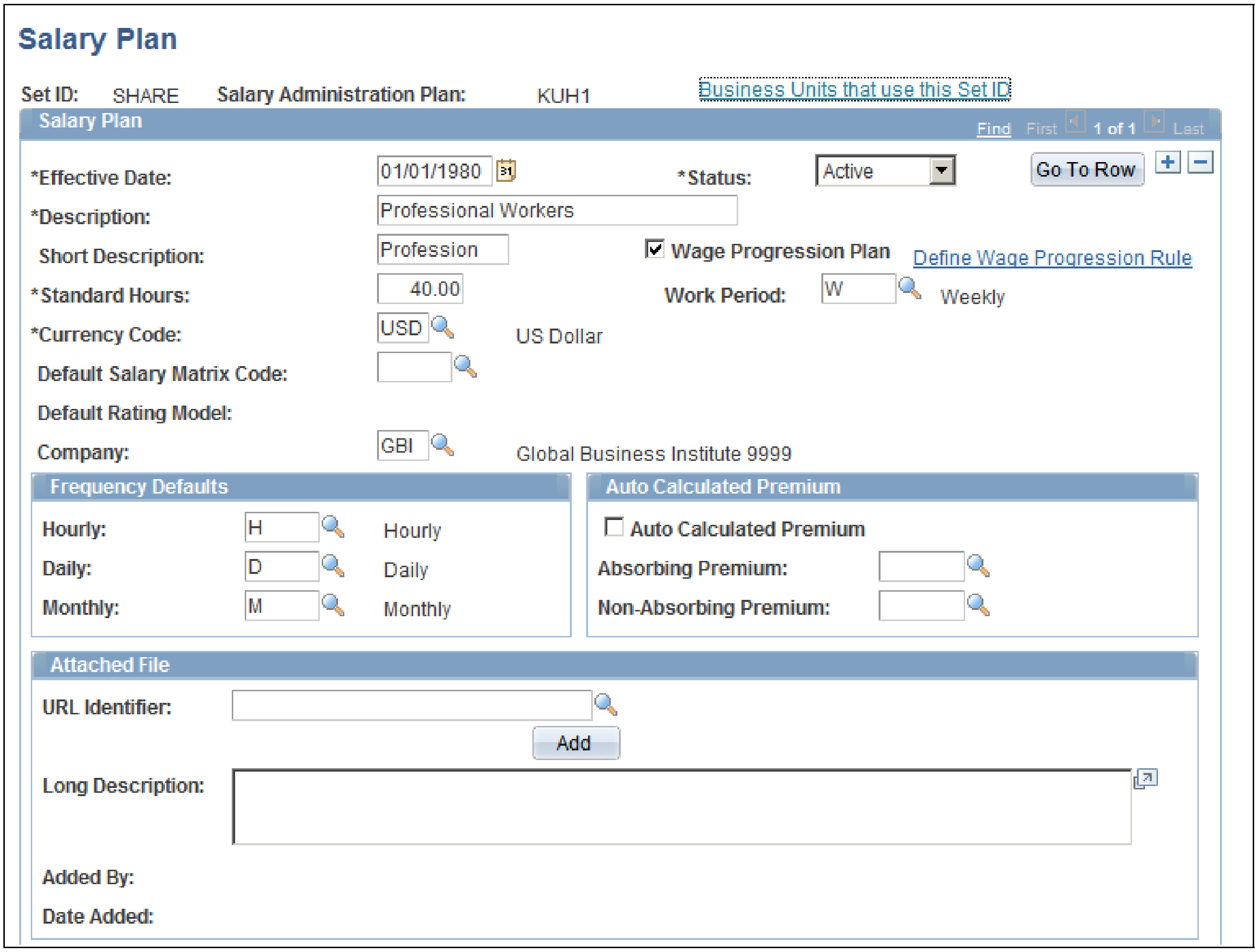
Pages Used to Set Up and Use Wage Progression with Administer Compensation

Page Name	***Definition Name***	***Navigation***	***Usage***
Salary Plan	SALARY_PLAN_TABLE	• Set Up HRMS, Product Related, Compensation, Base Compensation, Salary Plan • Compensation, Base Compensation, Maintain Plans, Define Salary Plan	Define salary plan basics.

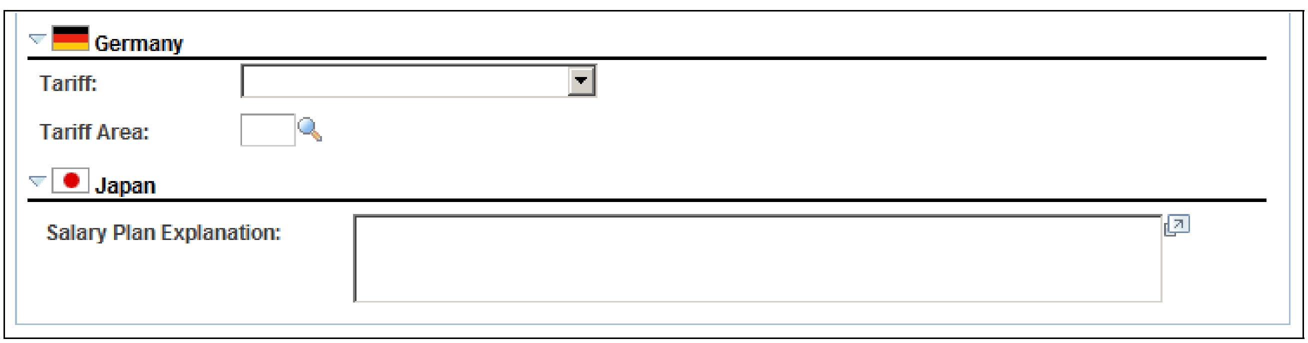
Page Name	Definition Name	Navigation	Usage
Define Wage Progression Rule	SALARY_PLAN_TABLE2	• Set Up HRMS, Product Related, Compensation, Base Compensation, Salary Plan Select the Wage Progression Plan check box. The system displays the Define Wage Progression link. Click this link to display the page. • Compensation, Base Compensation, Maintain Plans, Define Salary Plan Select the Wage Progression Plan check box. The system displays the Define Wage Progression link. Click this link to display the page.	Define wage progression rules associated with a salary plan.
Salary Step Components	SALARY_GRADE_T3GBL	Compensation, Base Compensation, Maintain Plans, Define Salary Grades, Salary Step Components	Generate salary steps using wage progression rules.

Defining a Salary Plan with a Wage Progression Rule

Access the Salary Plan page (Set Up HRMS, Product Related, Compensation, Base Compensation, Salary Plan).



Salary Plan page (1 of 2)



Salary Plan page (2 of 2)

Salary Plan

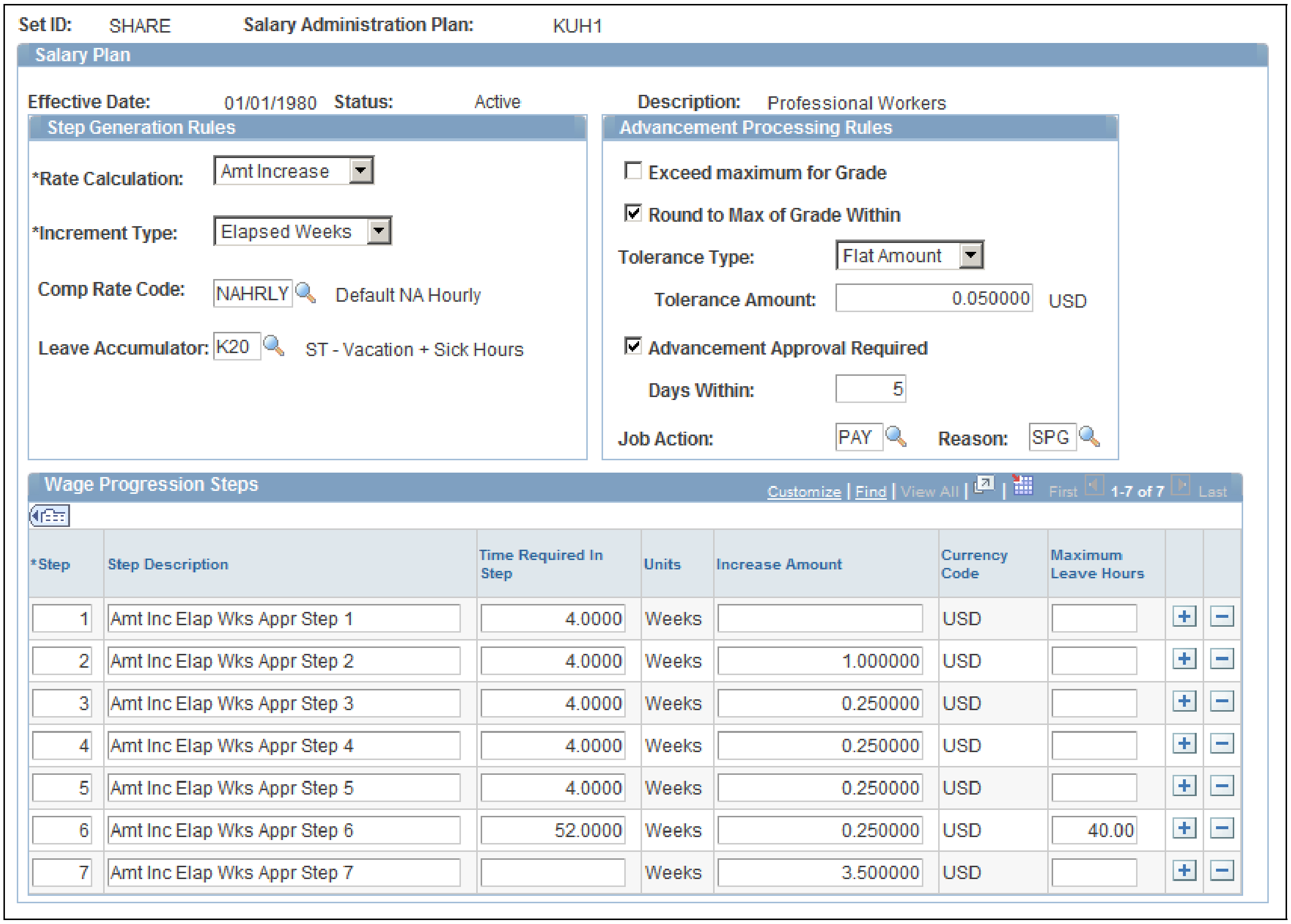
Wage Progression Plan Select this check box if you want to associate a wage progression rule to this salary administration plan.

The other fields on this page are discussed in the Manage Base Compensation and Budgeting PeopleBook.

See *PeopleSoft HR 9.1 PeopleBook: Manage Base Compensation and Budgeting*, "Setting Up Base Compensation and Budgeting," Associating Salary Components With Salary Steps.

Defining Wage Progression Rules

Access the Define Wage Progression Rules page (Set Up HRMS, Product Related, Compensation, Base Compensation, Salary Plan. Select the Wage Progression Plan check box. Then click the Define Wage Progression link.



Define Wage Progression Rules page

Step Generation Rules

Rate Calculation

Select the method to calculate rates. These values are used during the generation of rate codes and values that appear on the Salary Grade Step Components page. Values are:

- *% Grade Max:* Step rate will be the specified percentage of the grade's maximum rate.
- *% Grade Min:* Step rate will be the specified percentage of the grade's minimum rate.
- *% Increase:* A percentage-based increase will be added to the pay rate of the worker's previous step.
- *Amt Increase:* A specific amount for the increase to be added to the pay rate of the worker's previous step.

Note. For incremental calculation methods, the step generation process will store a step rate code value based on the grade's minimum rate. However, during the wage advancement process of calculating the worker's new step rate, incremental percentage or incremental amounts will be applied to the worker's actual rate for the rate code designated in the wage progression rule. For the Percentage of Maximum or Minimum and the User Defined types, the worker's new rate value comes from the stored grade step rate codes.

- *User Defined:* Select this value if the step rates do not match the criteria of any of the other calculation methods.

  Rates must be manually entered on the Grade Step Components page.

Increment Type

Select the method required by your labor agreement to determine the manner in which a new hire or new-in-job worker is evaluated for advancement to the next pay step. Values are:

- *Elapsed Months:* Select this method if you want to advance the worker based on a number of months since they entered their step.
- *Elapsed Weeks:* Select this method if you to advance the worker based on a number of weeks since they entered their step.
- *Hours Worked:* Select this method if you want to advance based on the worker's actual hours worked.

  An interface to Payroll for North America is delivered, however staging tables can accept data extracted from other time sources. Time can also be entered manually into the Review Wage Progression page.

Comp Rate Code (compensation rate code)

This rate code is inserted on the grade step during step generation and will store the calculated rate.

Hours Accumulator	Only available if you select an Increment Type of *Hours Worked.* Select the Payroll for North America Payroll special accumulator to use in order to capture the hours worked for this wage progression rule.
Leave Accumulator	(Optional) This field is only available if you select an Increment Type of *Elapsed Months* or *Elapsed Weeks.* This Payroll for North America special accumulator can capture reported leave hours. This is only required if your progression rule has a secondary qualifier to make sure a worker has not exceeded the specified number of leave hours during the required elapsed time in the step.

Advancement Processing Rules

Exceed maximum for Grade	(Optional) This field is only available if the calculation method is an increase type. Select this check box if it is acceptable for the worker's new step rate to exceed the maximum for the grade.
Round to Max of Grade (round to maximum of grade)	(Optional) This field is only available if the calculation method is an increase type. Select this check box if you want to round the calculated new rate value to the grade maximum value when it is within the specified tolerance.
Tolerance Type	This field indicates the closeness unit that you want the rounding rule to evaluate. Select one of these values: • *Percent:* Enter the percent for the tolerance. If you select this option, the Tolerance Percent field becomes available. • *Flat:* Enter the amount of the tolerance. If you select this option, the Tolerance Amount field becomes available.
Tolerance Percent	Enter the percent for rounding purposes. This field is available if you select *Percent* as a Tolerance Type.
Tolerance Amount	Enter the amount for rounding purposes. This field is available if you select *Flat* as a Tolerance Type.
Advancement Approval Required	(Optional) Select this check box if approval is necessary before step increases are awarded. When selected you must review and manually approve workers in order for the step advancement batch process to pick them up and perform the step and compensation updates. To manually approve the advancement, use the Approve Employees to Advance page (Workforce Administration, Labor Administration, Wage Progression). If you select this check box, the Days Within: field becomes available.

Days Within To present workers for approval prior to their estimated advancement date, enter the number of days prior to that date. The workers will be set to Almost Qualified status during the Update Wage Progression Qualification sub-process. You can then approve them early, if appropriate. This can facilitate timely processing of the step and rate increase and its recognition by payroll.

Job Action Select a job action to be assigned by the advancement process when it inserts a new job row. Values come from the Actions page.

Reason Select a related reason code from the values which come from Action Reason page.

Note. Once workers have reached or exceeded the maximum rate for the grade, they are considered at *parity* for their job wage rate. When this occurs, the worker's step will be incriminated to the highest step for the grade and they will be placed on Stop Wage Progression and will no longer be processed by any of the wage progression processes.

Note. Since the number of hours worked are accumulated in pay period increments, hours worked based rules assign the worker's advancement date as the start of their next pay period. Elapsed time based rules will assign the advancement date based on adding the required time in the step to the worker's step entry date.

Wage Progression Steps - Time in Step tab

Step Enter the numerical value for the Step IDs in the order in which the wage progression rules should be generated.

Step Description Enter a description for the step in this free form field.

Time Required in Step Enter the amount of time that the worker must remain in the step before they can be advanced.

Units The values are display only and are automatically generated depending on the Increment Type field.

Wage Progression Steps - Increase tab

Increase Amount Enter the amount for the rate increase for this wage progression rule. The increase parameter will vary depending on the calculation method. For example, if the method is percent of grade maximum, the value will be a percent or if the method is incremental amount, the value will be an amount. The currency code of the Salary Plan applies.

Wage Progression Steps - Time Limits tab

(Optional) These limits are secondary rules that can be applied in addition to the primary time in the step requirements.

Time Limit

For Hour-based rules: Enter a numerical value for the calendar time limit associated with the time in step requirement.

Time Limit Units

Select the increment used for the time limit. Values are *Days,Months, Weeks,* and *Years.*

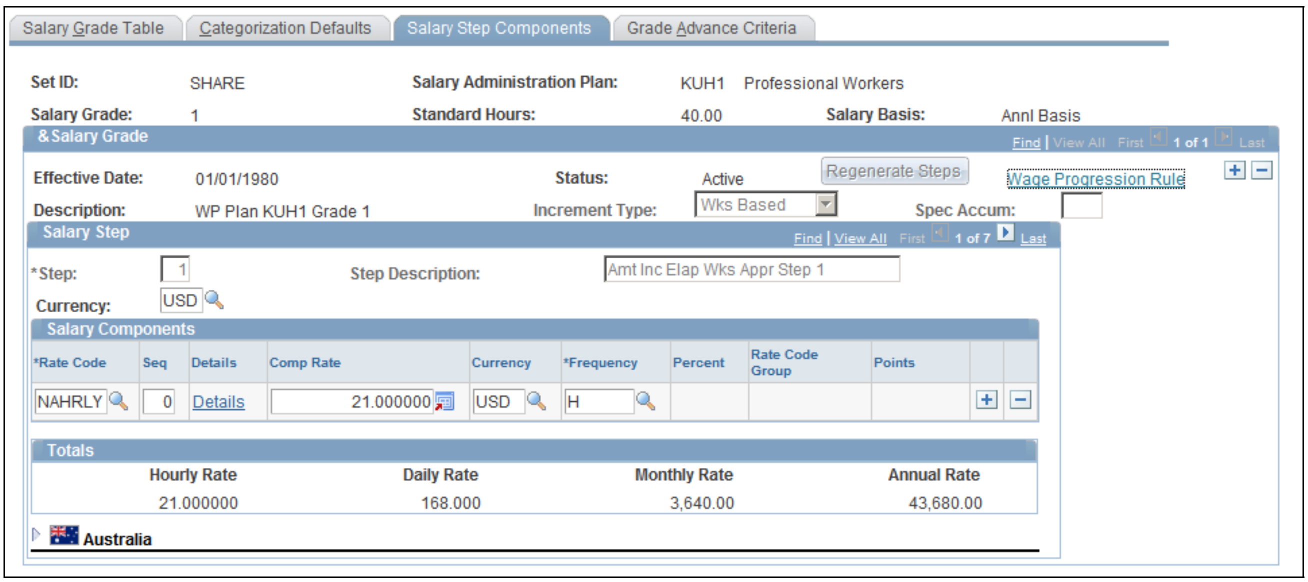
Maximum Leave Hours

For Elapsed Time based rules: Enter the maximum number of leave hours that are allowed at each step.

You must also define and associate a Payroll for North America Special Accumulator in the Leave Accumulator field.

Applying Wage Progression Rules to Salary Plans

Access the Salary Step Components page (Compensation, Base Compensation, Maintain Plans, Define Salary Grades, Salary Step Components).



Salary Step Components page

Important! You must include ranges for the minimum, midpoint, and maximum salary ranges on the Salary Grade Table page prior to generating steps.

Salary Grade

Spec Accum (special accumulator)

Displays the Hours Accumulator value which reflects the Hours Worked accumulator from the wage progression rule defined for the salary plan. Only applicable when Payroll for North America is used.

Generate Steps or **Regenerate Steps**	Click this button to calculate or recalculate the salary steps per the salary plan's wage progression rules. Click the View All in the Salary Step group box to review the generated step details. The button changes to Regenerate Steps once you have saved the page. **Important!** You should regenerate steps when you change the wage progression rule.
Wage Progression Rule	Click this link to access the Wage Progression Rules page where you can view wage progression rules associated with this salary grade.

Salary Step

You can manually add Salary Component rate codes if the step requires rate codes in addition to those defined on the wage progression rule.

Hours to Next Step Increment	Displays the number of hours that the worker must accumulate in this step before being eligible for the next step increment.

Chapter 5

Administering Seniority Pay

This chapter provides an overview of the Update Seniority Pay process and discusses how to administer seniority pay.

Understanding the Update Seniority Pay Process

Many organizations pay a premium for seniority. Seniority is the length of time that a person works for an organization.

The Update Seniority Pay process adds and updates seniority rate codes in worker compensation packages. The process determines whether each worker's compensation package contains the correct seniority rate codes.

If a worker's compensation package contains a seniority rate code:

1. The system determines whether adequate time has passed for the worker to reach the next seniority level.
2. If the worker is eligible for the next seniority level, the system inserts a new job row and adds a new compensation package with the seniority rate code and corresponding amount of pay for the next seniority level.

If the worker's compensation package does not contain a seniority rate code:

1. The system inserts a new job row with an action of Pay Rate Change and a new action reason of SEN (seniority).
2. The system updates the worker's compensation package to add the seniority rate code.

Important! You cannot associate configurable matrices to senior pay rate codes.

Administering Seniority Pay

To administer seniority pay, use the Update Seniority Pay (RUN_CMP013) and Update Seniority Eligibility (RUN_CMP014) components.

To administer seniority pay:

1. Run the Update Seniority Pay process (CMP013) to add and update seniority rate codes in worker compensation packages.

   You can also add seniority rate codes to worker compensation packages manually. Even though you add these codes manually, the Update Seniority Pay (CMP013) process updates them.

2. Run the Update Seniority Eligibility process (CMP014S) to determine if workers are still eligible for seniority pay components.

   If a worker is no longer eligible for seniority pay, the system removes the seniority rate code from that worker's compensation package. However, the process does not remove the seniority rate codes that were added manually.

3. Run the Multiple Seniority Components report and review the worker records that have multiple seniority rate codes and determine whether the seniority components are appropriate.

This section provides an overview of the Update Seniority Pay process, lists prerequisites, and discusses how to:

- Update seniority pay components.
- Ensure worker eligibility for seniority pay components.

Prerequisites

You must have created seniority rate codes by associating rate codes with a seniority rate code class on the Comp Rate Code Table page.

See Also

Chapter 2, "Setting Up Administer Compensation," Defining Rate Codes, page 7

Pages Used to Administer Seniority Pay

Page Name	***Definition Name***	***Navigation***	***Usage***
Update Seniority Pay	RUNCTL_SENPAY2	Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Pay, Update Seniority Pay	Add and update seniority pay components in workers' compensation packages.

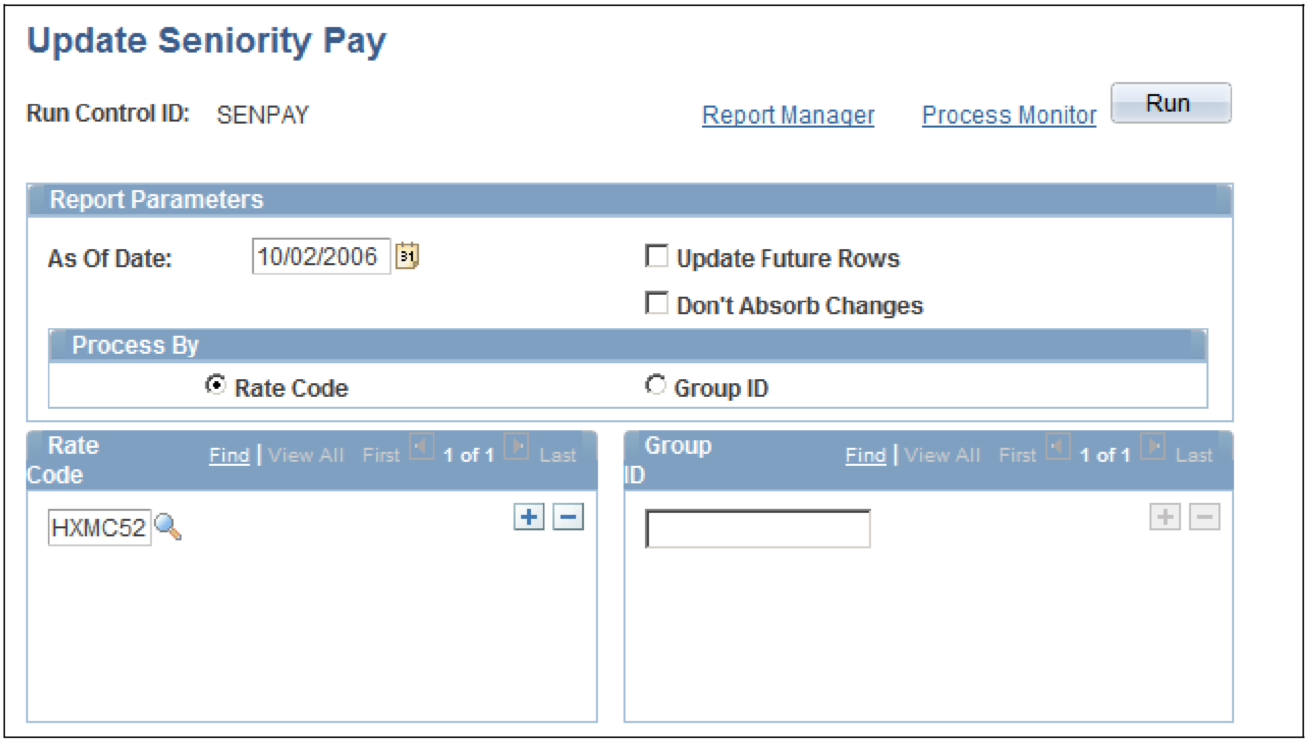
Page Name	Definition Name	Navigation	Usage
Update Seniority Eligibility Multiple Seniority Components	RUNCTL_SENPAY	• Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Eligibility, Update Seniority Eligibility • Workforce Administration, Collective Processes, Seniority Processing, Multiple Seniority Components	1. Run the Update Seniority Eligibility Process (HR_CMP014) to ensure that workers are still eligible for seniority pay components. 2. Generate the Multiple Seniority Components report (PER044). Use this report to review the worker records that have multiple seniority rate codes.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HCM Reports," PER044 - Multiple Seniority Components – Basic Report

Updating Seniority Pay Components

Access the Update Seniority Pay page (Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Pay, Update Seniority Pay).



Update Seniority Pay page

Update Future Rows

Select to update all existing future effective-dated rows (rows that have an effective date later than the as of date) in addition to the effective-dated row you are adding or correcting.

Don't Absorb Changes

Select to leave absorbable rate codes unchanged if there is a change in the defaulted salary amount.

This option applies only to workers who have target compensation rates and are assigned to salary plans with the Auto Calculated Premium function enabled.

Process By

Select Rate Code or Group ID as the way to run the Update Seniority Pay process (HR_CMP013).

Rate Code: The process adds or updates seniority rate codes in the compensation packages of all workers in groups that are associated with the seniority rate codes that you list on this page. If a seniority rate code is not associated with a group ID, the process adds or updates seniority rate codes in the compensation packages of all workers.

Group ID: The process adds or updates seniority rate codes in the compensation packages of all workers who are associated with the groups you list on this page.

Rate Code

This field is available when you select Rate Code in the Process By group box. Select one or more rate codes. Insert rows if you need to run the process using multiple seniority rate codes.

Group ID	This field is available when you select Group ID in the Process By group box. Select one or more group IDs. Insert rows if you need to run the process using multiple group IDs. The system only displays the groups for which you have security access.

Running the Update Seniority Pay Process

To run the Update Seniority Pay process:

1. Run the Application Engine process HR_CMP013.

   The Application Engine process finds the workers who meet the criteria specified in the run control parameters, and loads their information into a temporary table.

2. Run the SQR report CMP013 to review the information loaded by the Application Engine process.

3. Run the Application Engine process HR_CMP013_CI to load the information to the worker Job Data pages.

See Also

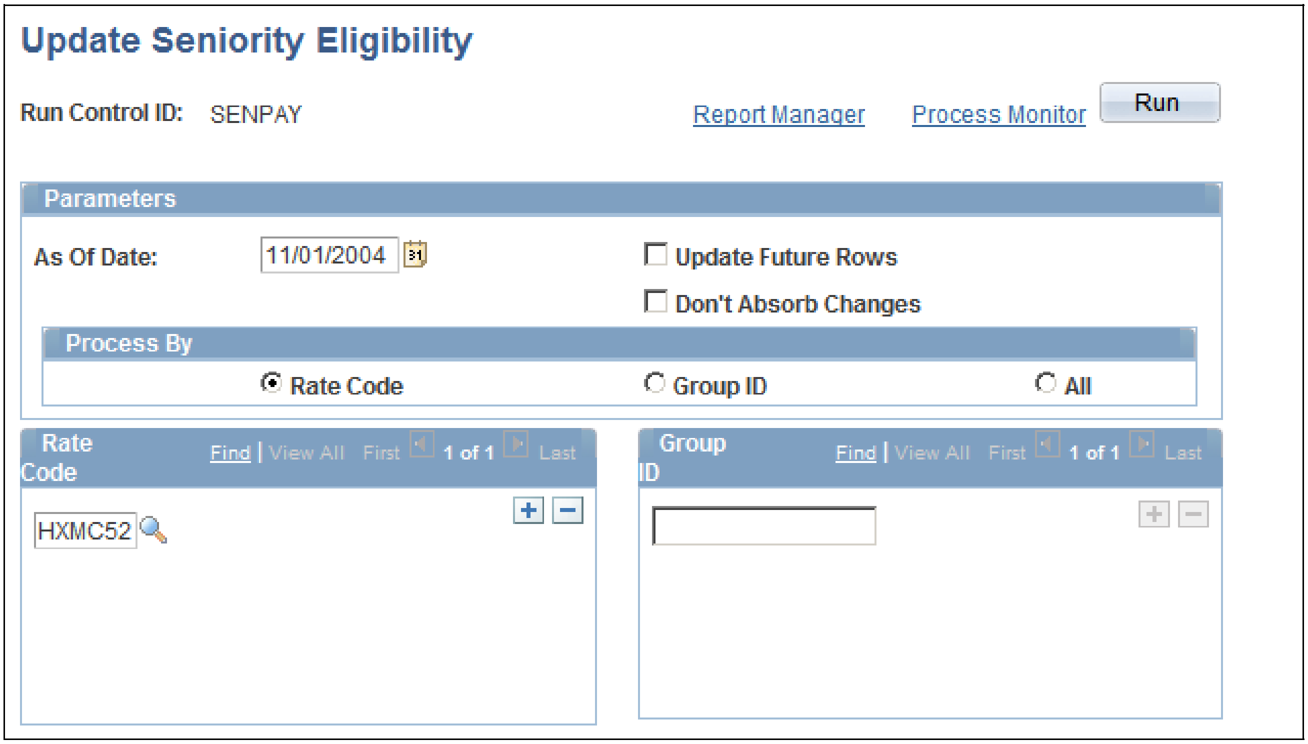
PeopleSoft HR 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting," Defining Salary Plan Characteristics

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions," Setting Up Group Security

PeopleTools 8.52: Process Scheduler PeopleBook

Ensuring Worker Eligibility for Seniority Pay Components

Access the Update Seniority Eligibility page (Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Eligibility, Update Seniority Eligibility).



Update Seniority Eligibility page

Process By Select All to run the report for all workers.

If a worker is not eligible for seniority, this process removes the seniority rate code from their worker compensation package—unless the seniority rate codes was added manually.

Note. The rest of the fields on this page are identical to those on the Update Seniority Pay - Seniority Pay page.

Running the Update Seniority Eligibility Process

To run the Update Seniority Eligibility process:

1. Run the Application Engine process HR_CMP014.

   The Application Engine process finds the workers who meet the criteria specified in the run control parameters, and loads their information into a temporary table.

2. Run the SQR report CMP014S to review the information loaded by the Application Engine process.

3. Run the Application Engine process HR_CMP014_CI to load all the information to the worker Job Data pages.

See Also

Chapter 5, "Administering Seniority Pay," Updating Seniority Pay Components, page 39

Chapter 6

Refreshing Worker Compensation Information

This chapter provides overviews of compensation defaults and salary plan compensation defaults and explains how to refresh worker compensation packages.

Understanding Compensation Defaults

When you hire a worker or update a worker's Job record, the system enters default compensation information in the Job record or leaves the compensation fields blank for manual entry. The source of the default compensation depends on the way you set up salary plan defaults, the nature of the worker's job change, or both.

Changing a Compensation Package

When you make a change to any element of a worker's Job record that affects compensation, the system resets the compensation components when you click the Default Pay Components button on the Compensation page of the Job Data component. The system does the following:

- Executes rate code defaulting, excluding seniority pay, based on the current defaulting values.

  You define these values when you set up rules-driven component defaulting.

- Executes rate code defaulting, excluding seniority pay, based on a rate matrix.

  You can associate a rate matrix when you set up rules-driven component defaulting.

- Replaces manual updates in default components with the current default values.
- Replaces the default values in non-updateable components with the current default values.
- Recalculates any compensation-related fields on the Job record, for example, comp rate, annual, hourly, daily amounts, compa-ratio, and so on.

If you don't click the Default Pay Components button after updating any relevant Job Data fields, the system issues a warning message when you attempt to save the new record. Click Cancel and go to the Compensation page, where you can click the Default Pay Components button and make any required changes manually. If you don't click the Default Pay Components button, the compensation package is not reset until the next time the default component logic is triggered (either by clicking this button or by a batch update process).

Recalculating Compensation

Click the Calculate Compensation button (on the Compensation page) to have the system recalculate the worker's compensation without executing any rate code defaulting or replacing any default values. You need to recalculate if you manually added new components or updated the values on existing components of the worker's compensation record. You cannot save the record after modifying the worker's pay components without recalculating the compensation.

Understanding Salary Plan Compensation Defaults

You specify a worker's salary administration plan, labor agreement, grade, and step on the Job Data - Salary Plan page. When you hire a worker or make a change to his or her Job record, the system enters default salary plan information in the Job record or leaves the salary plan fields blank for manual entry. The source of the default compensation depends on the way you set up salary plan defaults, the nature of the job change, or both.

See Also

PeopleSoft HR 9.1 PeopleBook: Manage Base Compensation and Budgeting, "PeopleSoft HR Manage Base Compensation and Budgeting Preface"

Setting Up Salary Plan Defaults

Use the LOCATION_TABLE component interface to load data into the tables for these component interfaces.

You can assign default salary plans, grades, and steps to a worker in one or a combination of the following ways:

- Associate the salary plan with a location on the Location Profile page.
- Associate the salary plan with a job code on the Job Code Table - Default Compensation page.

  If there is no salary plan associated with the location entered on the Job Data - Work Location page, the system will enter the salary plan (and step and grade, if applicable) associated with the job code you enter on the Job Data - Job Information page.
- Assign a salary plan directly to a worker on the Job Data - Salary Plan page.

  You can enter a salary plan directly on the Job Data - Salary Plan page if there is a job code associated with the selected location or job code. You can also override any defaulted salary plan, step, or grade values.
- Associate a salary plan with a labor agreement on the Categorization Defaults page.
- Associate a salary plan with a labor agreement directly to a worker on the Job Data - Salary Plan page.

The system verifies that the combination of salary plan, steps, and grades that you enter in the Job Data component is valid and exists in the system. If the combination does not exist, the system issues a warning message.

Note. If you want to use the Default Pay Components functionality to automatically enter step component rates in Job Data, select Multi-step Grade on the Installation Table - HRMS Options page.

The system enters default values into the step components and other compensation fields when you click the Default Pay Components button. Only salary plan information defaults when you make a change to the job or location fields.

Salary Administration Plan Defaulting at Hire

The system enters the following salary administration plan when you hire a worker:

- If you have associated a salary administration plan with the location selected on the Job Data - Work Location page, the system will enter the salary plan on the Job Data - Salary Plan page.
- If you have associated a salary administration plan with the job code selected on the Job Data - Job Information page and *not* associated a salary plan with the selected location, the system will enter the salary plan (grade and step, if applicable) on the Job Data - Salary Plan page and leave the compensation information fields blank and available for entry.
- If you have a salary administration plan associated with both the location and the job code, the system will use the default value associated with the selected location.
- If you have not associated a salary administration plan with either the location or job code, the system will leave the salary plan, grade, and step fields available for entry.
- You may override the default salary administration plan values, provided that the new values are valid.

Note. If you have not associated a salary administration plan with either the location or job code, but have associated a base rate code with the job code, the system will insert the base rate code information when you click the Default Components button on the Job Data - Compensation page.

Salary Administration Plan Defaulting After Hire

The system enters the following default information when you enter a new location in the Job record of an existing worker:

- If there is a salary plan associated with the new location, the system checks the existing grade and step values against the grade and step values of the salary plan.

  If the grade and step are valid for the new location's salary plan, the system enters the new salary plan on the Job Data - Salary Plan page.
- If the grade and step are *not* valid for the new location's salary plan, the system leaves the existing salary plan value. This ensures that the worker is not inadvertently left without a compensation plan.

  If you want to change the grade and step as a part of your update, you must change the salary plan to one that includes the new grade and step.

The system enters the following information when you enter a new job code in the Job record of an existing worker:

- If there is a salary plan associated with the new job code and not with the location code, the system enters the salary plan, grade, and step information associated with the job code.
- The system does not enter the base rate code associated with the new job code but inserts the default compensation data from the previous data row.

Note. When you click the Default Pay Components button, the system does not insert into an existing Job record the base rate code information associated with the new job code. It only inserts this information when you create a new Job record (that is, when you hire a worker).

Refreshing Worker Compensation Packages

To refresh worker compensation packages, use the Refresh Compensation (RUN_CMP015) component.

Use the Refresh Employee Compensation Application Engine process (HR_CMP015) to update worker compensation packages when you make a change to any element of a worker's Job record that affects compensation. This process recalculates compensation based on the current values in the system and automatically populates the correct compensation amount by inserting a new Job row (unless there is no change to a worker's compensation). The process replaces manual changes with the new default values.

Note. If the user ID of the person running the Refresh Compensation process does not have full access to the CI_JOB_DATA component, the system displays an error message.

Understanding the Refresh Employee Compensation Process

The Refresh Employee Compensation process executes the same steps as the Default Pay Components button on the Compensation page; however, it enables you to update several records at once.

The Refresh Employee Compensation process:

- Inserts a new Job row when you select Add new effective date with the effective date you entered in the As Of Date field.
- Updates the job row that is effective as of the date you select in the As Of Date field.
- Updates any future rows when you select Update Future Rows. (A future row is one that comes into effect after the as of date.)

See Also

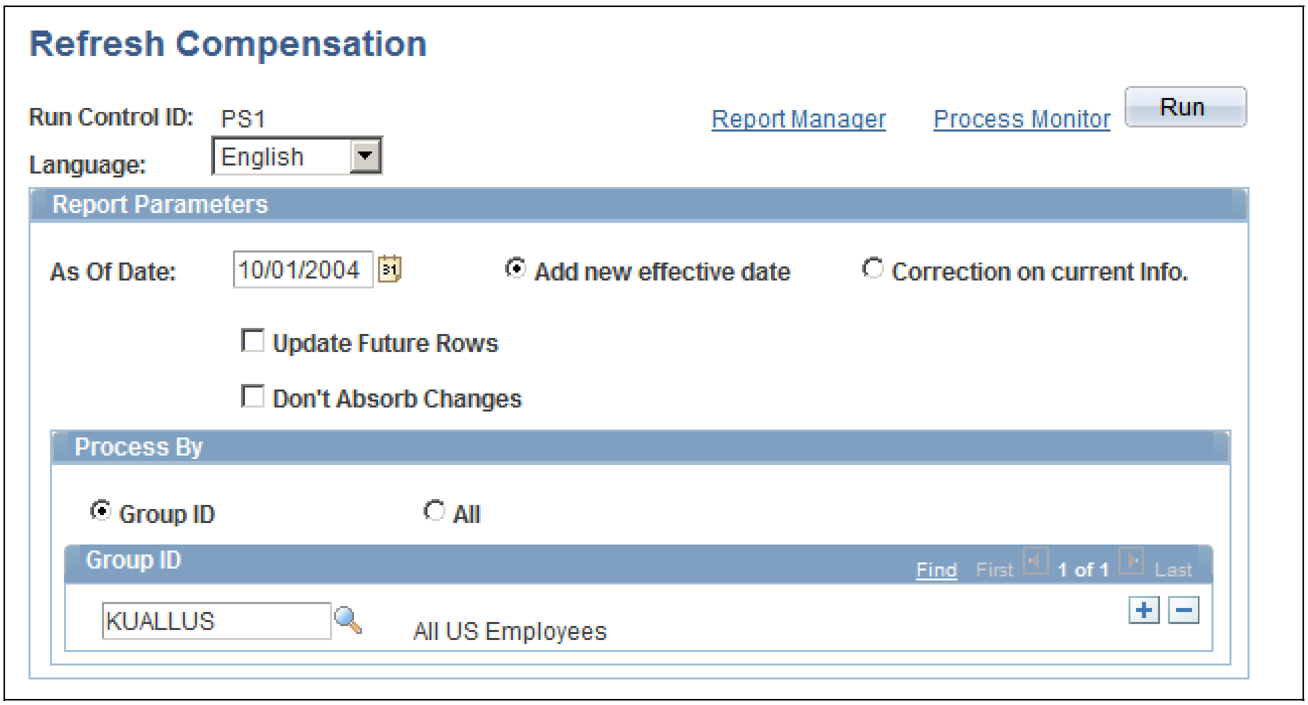
Chapter 3, "Defining Compensation Rates and Rules-Driven Component Defaulting," Understanding Rules-Driven Component Defaulting, page 17

Page Used to Refresh Worker Compensation Packages

Page Name	*Definition Name*	*Navigation*	*Usage*
Refresh Compensation	RUNCTL_CMP015	Workforce Administration, Collective Processes, Refresh Compensation	Refresh multiple worker compensation packages with current default values, and print a report that displays the new and previous compensation data of the impacted workers.

Running the Refresh Employee Compensation Process

Access the Refresh Compensation page (Workforce Administration, Collective Processes, Refresh Compensation).



Refresh Compensation page

Report Parameters

As Of Date and **Correction on current Info.** Select to update data and override information in worker records. The system updates the record that is effective as of the date you enter.

As Of Date and **Add new effective date**	Select to insert a new effective-dated row using As Of Date as the new effective date. For example, you enter *01/01/2003* in As of Date and run the process. The process inserts a new Job row with an effective date of 01/01/2003. If a record already exists with this effective date, the system inserts a row with the date and a sequence number.
Update Future Rows	Select to update all existing future effective-dated rows, in addition to the effective-dated row already being added or corrected. (A future effective-dated row is one that has an effective date later than the As Of Date you specify.)
Don't Absorb Changes	Select to leave absorbable rate codes unchanged when the defaulted salary amount changes. This option only applies to workers who have a target compensation rate and are assigned to a salary plan with the Auto Calculated Premium function enabled.

Process By

Group ID	Select to process by group ID. The update process selects all workers with the group ID you specify.
All	Select to process all workers to whom you have security access.

Running the Refresh Employee Compensation Process and Report

To run the process, select Refresh Employee Compensation (HR_CMP015) Application Engine process on the Process Scheduler Request page.

After you run this process, you can run the Refresh Employee Compensation report (CMP015) to review the data that has been updated. This report displays the new and previous compensation data for the impacted workers.

See Also

PeopleSoft HR 9.1 PeopleBook: Manage Base Compensation and Budgeting, "Setting Up Base Compensation and Budgeting," Defining Salary Plan Characteristics

Chapter 7

Implementing the Total Rewards Statement

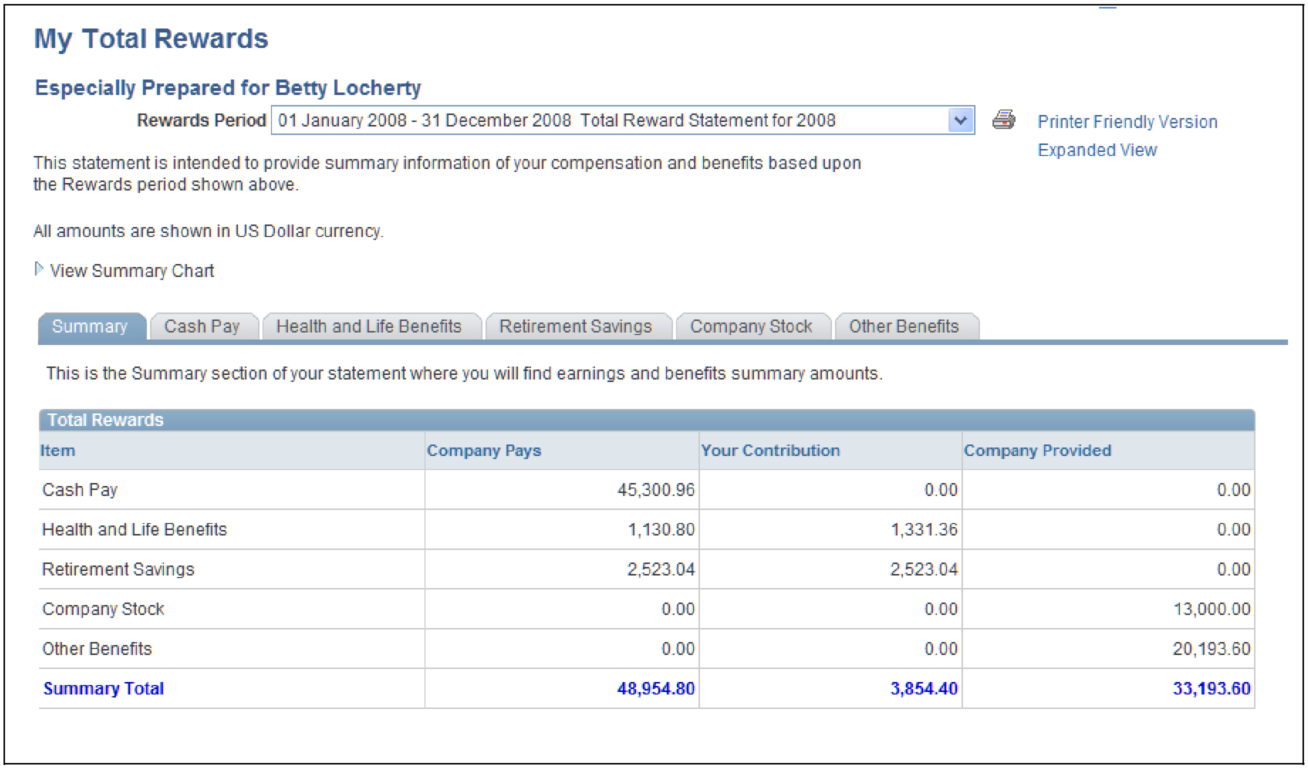
This chapter provides an overview on implementing the Administer Compensation- Total Rewards Statement and discusses how to:

- Define reward data source information.
- Define reward items.
- Define total reward templates.
- Define external reward data.
- Administer the total rewards statement process.
- View and print the my total rewards statement.

Understanding the Administer Compensation Total Rewards Statement

Employers recognize that compensation and benefits are integral to their ability to keep and attract employees who foster excellence in their jobs. A total rewards statement is used to increase the employee's awareness of the total value of compensation (both salary and benefits).

Here is an example of a total rewards statement:



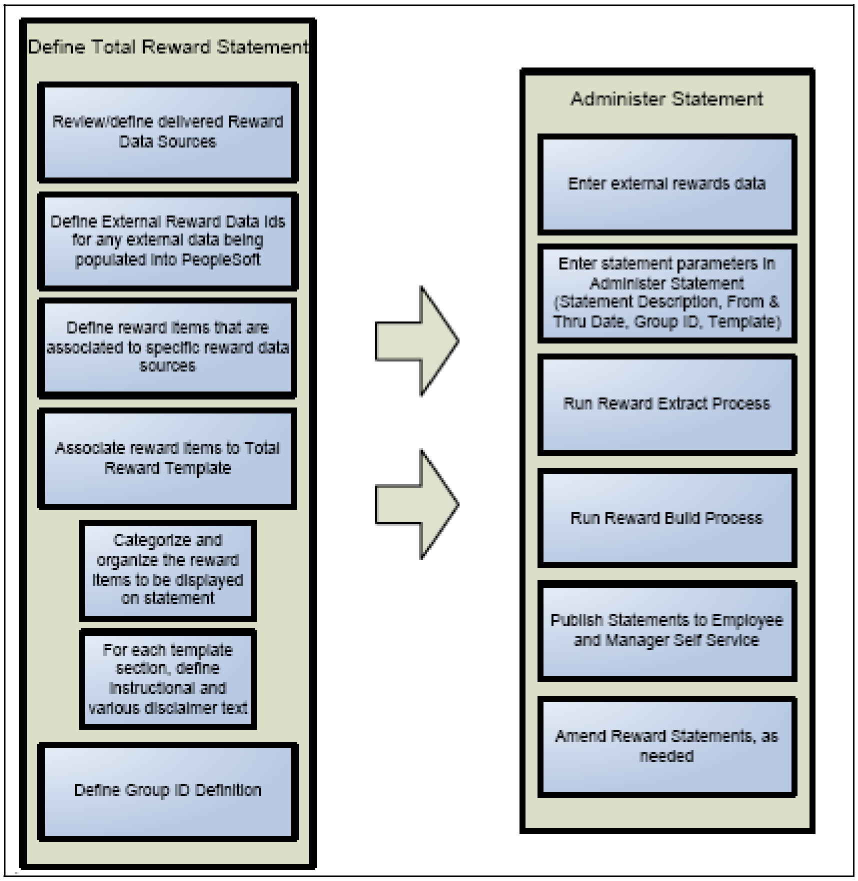
My Total Rewards page

A total rewards statement shows the employee's full value of their rewards including employer contributions to benefits, cash compensation, non-cash compensation, perks, and so on. This new functionality provides:

- A summary of an employee's total rewards at a glance.
- A breakdown of an employee's total rewards, including explanations and content information, links to existing employee reward details or third party vendors, and analytic charts.
- A view of all rewards, including non-cash compensation.
- The ability to generate and print a total rewards statement.

From the My Total Rewards self service application, employees can optionally print a paper copy of their total rewards statement. In addition, managers have the ability to view the total reward statements of their direct reports through manager self service.

Here is a graphic that shows the process for defining and administering a total rewards statement:



Total Rewards Statement Information Flow

To implement the Total Rewards feature you use these building blocks:

- Reward Data Source definition - a menu, component, pages, and tables that store information about the attributes of a reward data source. The reward data sources that are currently used include:
  - North American Payroll Earnings.
  - North American Payroll Deductions.
  - North American Payroll Taxes.
  - Benefit Leave Balance.
  - Stock Administration.
  - External Compensation Data.
- External Reward Data Definition - A component that enables the compensation administrator to define external reward data that is loaded into PeopleSoft.
- Reward Item - Table containing multiple items of reward data retrieved from a reward data source. Reward items are displayed on a total reward statement.
- Reward Template - Table containing multiple templates detailing the structure and layout of reward items displayed on a total reward statement.

- Reward Extract Process - An application engine process that extracts reward data for specific total reward statements.
- Reward Build Process - An application engine process that builds and summarizes sections in the total reward statement. This process also performs any currency conversions to display the employee's total reward statement in the currency defined on the employee's HR primary job record.
- Administer Statement Component - A component that enables the compensation administrator to manage the end-to-end process of generating total rewards statements.

Understanding Reward Data Sources

The key challenge in generating a total rewards statement is the ability to combine information from a wide variety of sources, and then combine those sources into a meaningful context with instructional text and analytics. In addition to this, the extracted compensation ultimately needs to be formatted, organized, and summarized into a total rewards statement. The business process of generating total rewards statements is to first identify the source of compensation, then retrieve data from the source, and finally display the information, which is configured through a template definition. This feature primarily deals with the business process to extract and summarize compensation data for a total rewards statement. This component covers these elements:

- Foundational components to support the data extract mechanism.
- Data extraction processes that retrieve compensation data for a single total rewards statement.
- Administrative console to initiate and monitor the process of generating a total rewards statement.

The current Total Compensation Reporting functionality retrieves its compensation data through multiple Application Engine and COBOL programs built to extract and calculate data from specific areas of a PeopleSoft application:

- North American Payroll,
- Variable Compensation, and
- Benefit Enrollments

The multiple programs make the process cumbersome for the customer and inflexible to retrieve data from other areas of the PeopleSoft application, such as Stock Administration, Global Payroll, or from an external system. One of the primary goals for the new Total Rewards functionality is to streamline the overall process and provide a more configurable table driven solution that enables the customer to define and extract employee level rewards data that is required for their total rewards statements.

In future releases, PeopleSoft plans to provide a set of reward items that map to a delivered set of data sources for existing data within the HCM application suite. This will allow you to quickly create a total rewards statement based on known data in the HCM system. Reward items will be considered system data.

The building blocks of the total rewards solution include:

- Reward Data Source - Table containing multiple sources of reward data.
- Reward Items - Table containing multiple items of reward data retrieved from a reward data source. Reward items are displayed on a total reward statement.

- Reward Template - Table containing multiple templates detailing the structure and layout of reward items displayed on a total reward statement.

- Reward Statement - Table containing multiple statements detailing the parameters used to generate a total reward statement for a specific group of employees for a particular reward template and period of time.

The goal of the reward data source is to provide a common definition (or set of metadata) that will be utilized by a single Reward Extract program to generate SQL to retrieve and load reward data for the total reward statement being processed.

To generate the SQL, the reward data source definition will take into consideration the parameters used for the total reward statement being processed.

Since a reward statement can be processed for a group of employees or an individual employee, different SQL criteria is generated based upon the run parameters to process a total reward statement. In addition to this, the values of the run parameters may be incorporated into the SQL differently based upon the reward data being extracted.

Moreover, there are other controls that can be put into place to enable the compensation administrator to specify the reward data they want to retrieve, For example, instead of defining a separate reward data source to retrieve earnings from North American Payroll for each configured earning code, the compensation administrator can specify the earning code as a reward item filter that they want to retrieve from the reward data source.

In addition, there are other ways to define a generic reward data source with some ability to enable the compensation administrator to specify parameters to control the data to be extracted.

Finally, the extracted data needs to be mapped into a set of common reward results tables to store the rewards data that will be displayed on the total rewards statement. The reward data source configuration is broken down into the following elements:

Element	***Description***
Extract Temporary Table	The system extracts a temporary table that will initially store extracted rewards data retrieved for a specific total reward statement. The Extract Temporary table has a key structure that uniquely identifies rows of reward data being retrieved. The Extract Temporary table is created in Application Designer.
Extract Table	The system creates one or more records or record views that are used to retrieve data that will be loaded into the Extract Temporary table. Similar to a query, record views are utilized because they provide the ability to combine data from multiple tables. Record views are defined through Application Designer.
Extract Filters	The system appends standard filter types to an SQL SELECT statement against the Extract table. Extract filters only incorporate reward statement run parameters to extract the reward data for the total reward statement being processed.
Reward Item Filters	The system uses additional filters that can be specified at the reward item level. This provides additional control to the compensation administrator to specify the data that the system will extract from the data source.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Reward Item Outputs</td><td>The system maps extracted data from the Extract Temporary table to the Statement Reward Item Detail table. Numeric reward data is mapped to these columns:
• Employee Paid
• Employer Paid
• Units
• Company Provided
• Rate Per Unit
Other detail fields can be used to display additional reward data when the employee drills down into a specific reward item.
Some detail fields will require a description to be displayed instead of a code; therefore the Detail Record and Description fields can be specified. For example, the system extracts the field COMPANY code, but you want to display Company description from the PS_COMPANY_TBL. To do this, specify the column heading description for an output field in the detail rewards data.</td></tr>
<tr><td>Reward Item Calculations</td><td>The system performs calculations on data in the Statement Reward Item Detail table to calculate final rewards data. Application Packages are also used to manage reward item calculations.</td></tr>
</table>

Note. The expectation is that most reward data being extracted for a total reward statement has been calculated. However, reward item calculations provide the ability to use Application Packages to create additional calculations that can be performed against the extracted reward data.

Defining Reward Data Source Information

This chapter provides an overview of the common elements that comprise a Reward Data Source and discusses how to:

- Define general information of reward data source.
- Define reward data source extract tables.
- Define reward data source extract filters.
- Define reward data source reward filters.
- Define reward data source reward output.
- Define reward data source reward calculations.
- Test reward source data.

Common Elements Used in this Section

Data Source ID and **Description**	Enter an abbreviation that uniquely identifies the Reward Data Source. Then enter a description of the Reward Data Source. These fields become display only on the other pages within the component.
Extract Temporary Table	The Extract Temporary table is a temporary table defined in Application Designer. It will be populated with data retrieved from the Extract tables. It is the table that the system will use as the reward data source. In addition, reward item filters are created from the fields on the Extract temporary table.

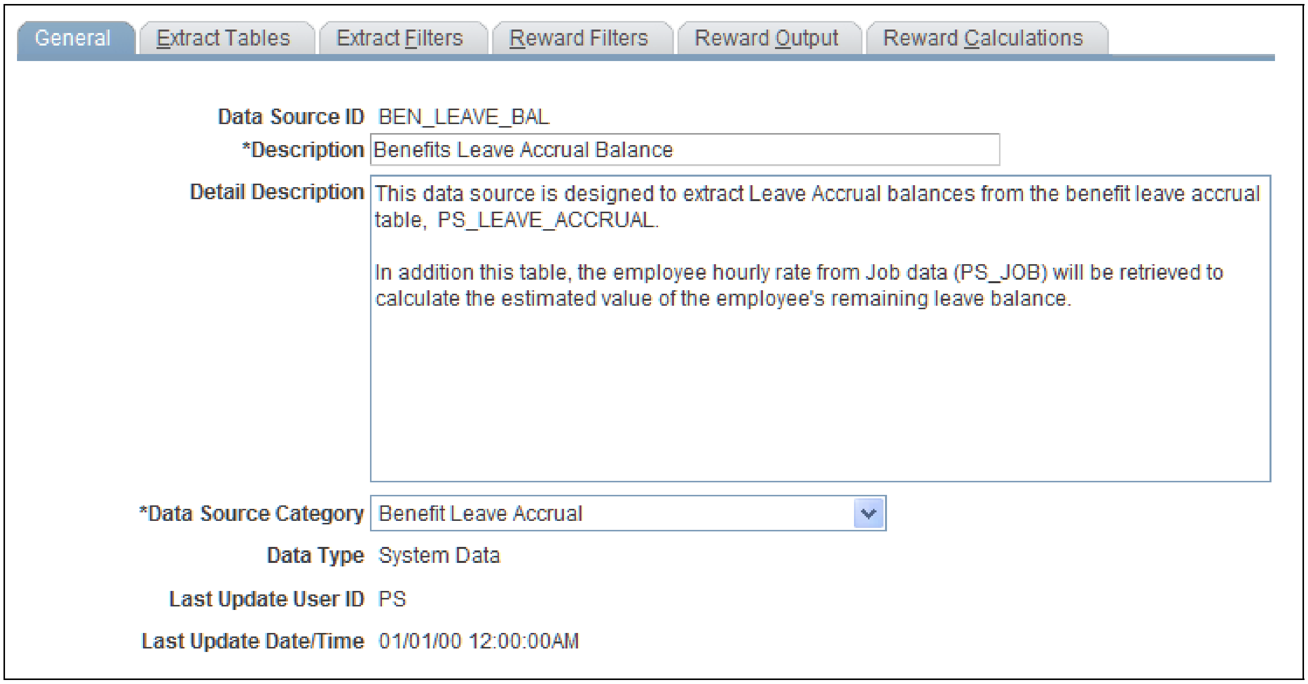
Pages Used to Define Reward Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Reward Data Source - General	TRW_DATASRC_GNRL	Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, General	Enables the user to enter a general description, a detail description, and a high level data source category for the reward data source.
Define Reward Data Source – Extract Tables	TRW_DATASRC_EXTBL	Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, Extract Tables	Enables users to setup the Extract tables for the reward data source. Users will have the ability to enter a record name defined in Application Designer. They also can view the SQL text for the record view.
Define Reward Data Source - Extract Filters	TRW_DATASRC_EXFIL	Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, Extract Filters	Enables users to define extract filters that are used to retrieve reward data for the statement being processed. The extract filters are used during the extract process to retrieve data from extract tables into extract temporary table. A link initiates a secondary page allowing the user to enter the extract filter for a specific extract filter type.

Page Name	Definition Name	Navigation	Usage
Define Reward Data Source – Reward Filters	TRW_DATASRC_RIFIL	Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, Reward Filters	Enables users to create reward item filters from a field in the Extract table. Reward item filters are additional filters defined at the reward item level that enable the compensation administrator to control the rewards data that is extracted.
Define Reward Data Source - Reward Output	TRW_DATASRC_RIOUT	Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, Reward Output	Enable users to map fields from the Extract temporary table to the Statement Reward Item Detail table. Users can also control the selection of the table to retrieve the description for a detail data field along with the Detail Grid Column label.
Define Reward Data Source – Reward Calculations	TRW_DATASRC_RICALC	Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, Reward Calculations	Enables users to specify the path to an application class that will perform a calculation. This page also displays the configurable matrix if the application class is retrieving rate information to perform a calculation.
Test Reward Data Source	TRW_TEST_DATASRC	Set Up HRMS, Product Related, Compensation, Total Rewards, Total Reward Utilities, Test Reward Data Source	Enables the user to enter reward statement run parameters to test if the reward data source is working correctly.

Defining General Reward Data Sources

Access the Define Reward Data Source - General page (Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, General).



Define Reward Data Source – General page

Detail Description

A detail description providing a functional explanation of where the rewards data is being extracted.

Data Source Category

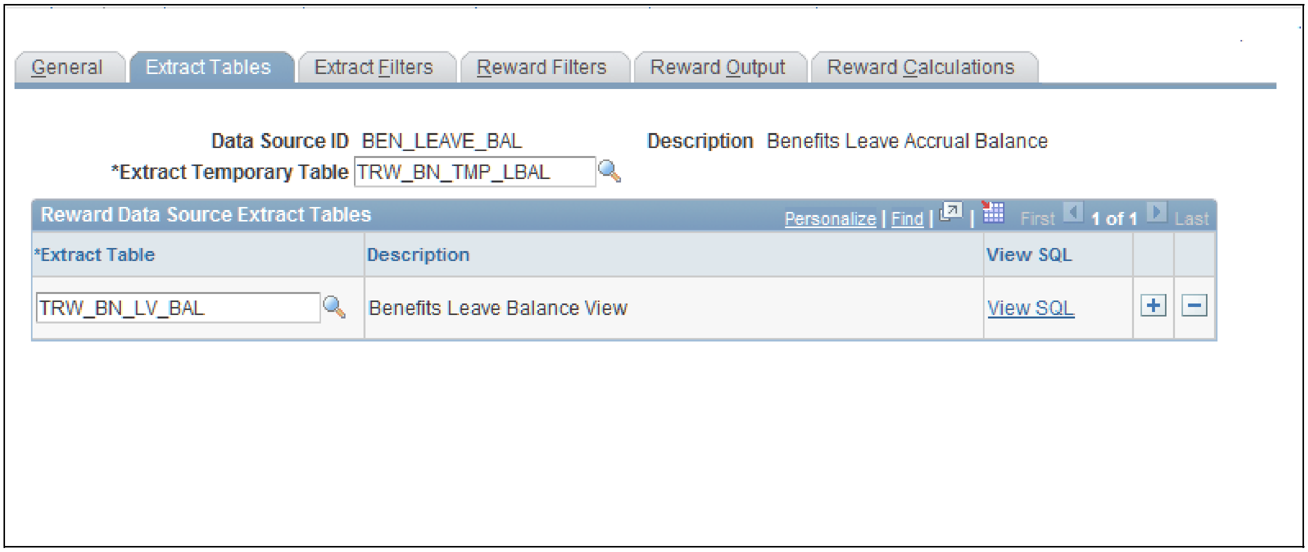
A high level category assigned to the Reward Data Source. Listed below are the data source categories that can be entered:

- Absence Management
- Benefit Leave Accrual
- External Data
- Global Payroll
- North American Payroll
- Stock Administration

Note. This category is useful in validating if external data has been loaded for the reward data source. This validation is confirmed by the compensation administrator through the Administer Statement component.

Defining Reward Data Source Extract Tables

Access the Define Reward Data Source – Extract Tables page (Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, Extract Tables).



Define Reward Data Source – Extract Tables page

Reward Data Source Extract Tables

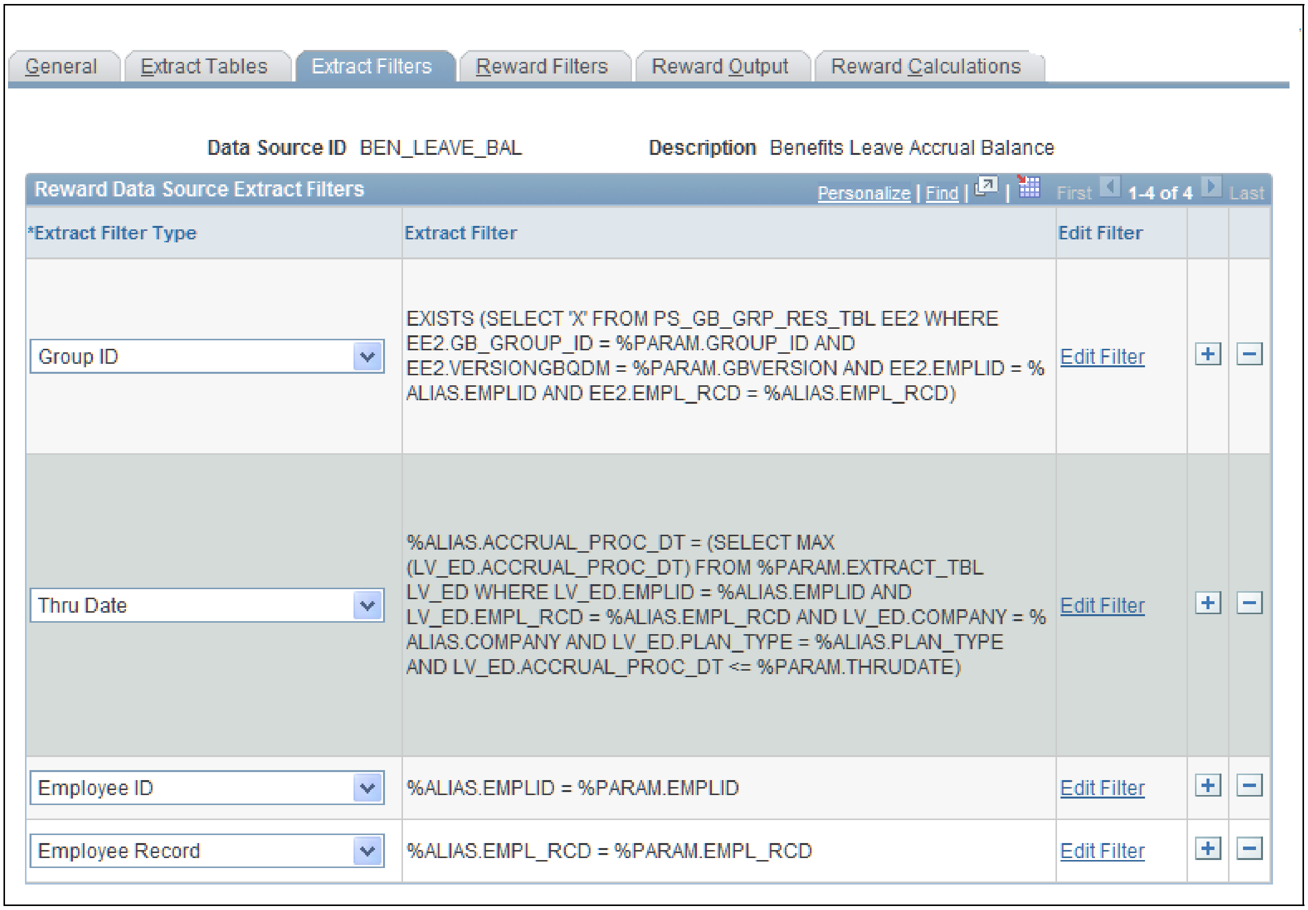
Extract Table The Extract Table is defined in the Application Designer and designed to extract rewards data from PeopleSoft.

Description Displays the table description defined in Application Designer.

View SQL This link is enabled when the table is defined as a view in Application Designer. Click the View SQL link to display a secondary page that will show the SQL statement used by the view.

Defining Reward Data Source Extract Filters

Access the Define Reward Data Source – Extract Filters page (Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, Extract Filters).



Define Reward Data Source – Extract Filters page

Reward Data Source Extract Filters

Filter Type

The filter type controls the Reward Statement run parameters that will be included in the Extract Filter. Listed below are the delivered filter types:

- Group ID - Group Build is used to identify the population of employees to be processed.
- From Date - Statement from date.
- Thru Date - Statement thru date.
- From and Thru Date - Statement from and thru date.
- Employee ID - Employee ID being amended.
- Employee Record - Employee record being amended.

Extract Filter

Display only field. The extract filter is the filter text specified for the filter type. The filter parameters are the variables that need to be included in the extract filter. These variables are required to substitute the variable with the reward statement run parameter at runtime. Listed below are the filter types and the associated substitution variables when a filter type is selected:

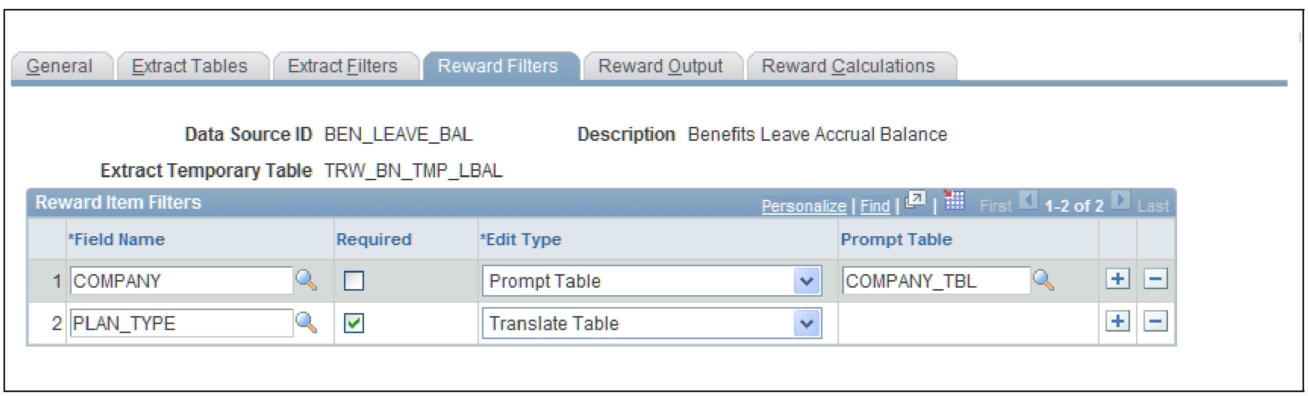
- Group ID - %PARAM.GROUP_ID , %PARAM.GBVERSION, %ALIAS
- From Date - %PARAM.FROMDATE, %PARAM.EXTRACT_TBL, %ALIAS
- Thru Date - %PARAM.THRUDATE, %PARAM.EXTRACT_TBL, %ALIAS
- From and Thru Date - %PARAM.FROMDATE, %PARAM.THRUDATE, %PARAM.EXTRACT_TBL, %ALIAS
- Employee ID - %PARAM.EMPLID, %ALIAS
- Employee Record - %PARAM.EMPL_RCD, %ALIAS

Edit Filter

Click to display a secondary page that enables users to enter extract filters.

Defining Reward Data Source Reward Filters

Access the Define Reward Data Source – Reward Filters page (Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, Reward Filters).



Define Reward Data Source – Reward Filters page

Reward Item Filters

Field Name

Select a field name from the Extract temporary table to define a reward item filter. Certain fields that should not be used as reward item filters include:

- EMPLID
- EMPL_RCD
- TRW_STMT_ID
- TRW_DATASRC_ID

Required

Click this check box to mark a reward item filter as required. This will require the compensation administrator to configure the reward item filter when using this reward data source to define a new reward item.

Edit Type

To ensure that the compensation administrator enters a valid value, when configuring the reward item filter at the reward item level, an edit type can be associated to the Reward Filter field. Listed below are the valid edit types:

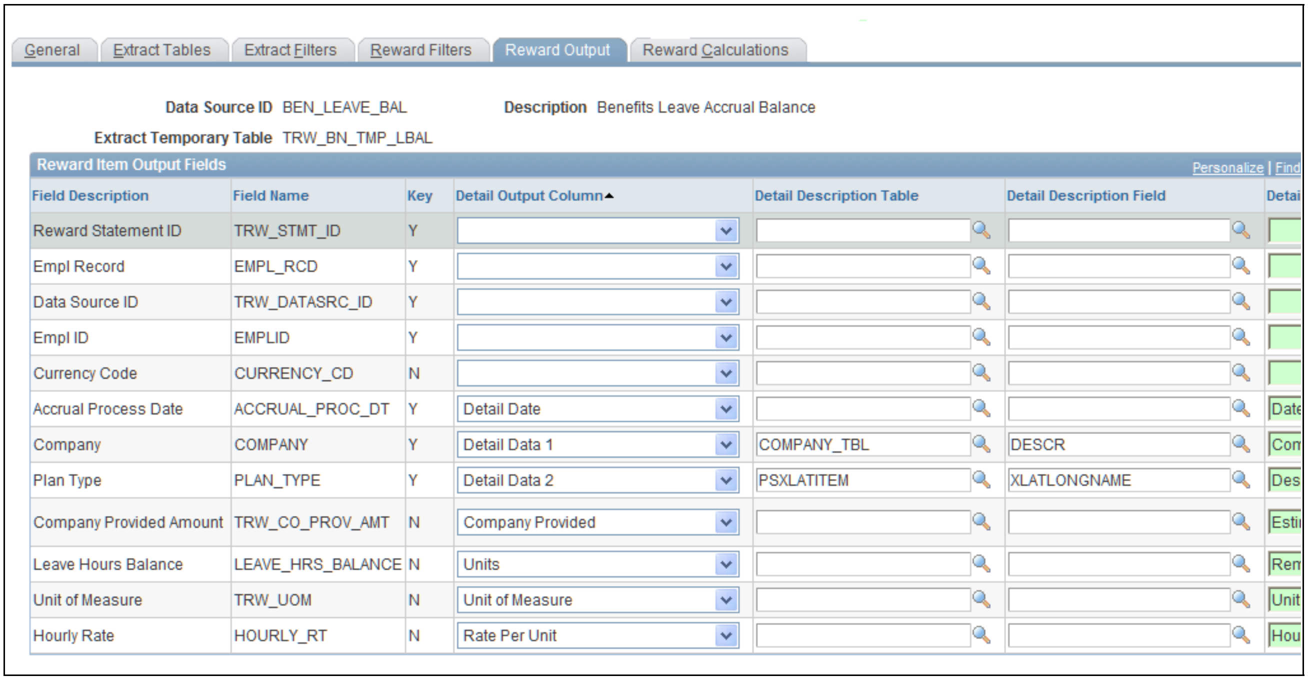
- No Table Edit
- Prompt Table
- Translate Table Edit
- Yes/No Prompt Table

If the edit type of Prompt Table is chosen, then a prompt table must be specified to retrieve valid values for the Field Name when the compensation administrator configures the reward item filter at the reward item level.

Note. If the field is not the highest key on the prompt table, then a view against the prompt table will need to be created in order to select the Reward Item Filter value when defining a reward item.

Defining Reward Data Source Reward Output

Access the Define Reward Data Source – Reward Output page (Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, Reward Output).



General | Extract Tables | Extract Filters | Reward Filters | Reward Output | Reward Calculations

Data Source ID BEN_LEAVE_BAL **Description** Benefits Leave Accrual Balance

Extract Temporary Table TRW_BN_TMP_LBAL

Reward Item Output Fields Personalize | Find

Field Description	Field Name	Key	Detail Output Column	Detail Description Table	Detail Description Field	Detai
Reward Statement ID	TRW_STMT_ID	Y				
Empl Record	EMPL_RCD	Y				
Data Source ID	TRW_DATASRC_ID	Y				
Empl ID	EMPLID	Y				
Currency Code	CURRENCY_CD	N				
Accrual Process Date	ACCRUAL_PROC_DT	Y	Detail Date			Date
Company	COMPANY	Y	Detail Data 1	COMPANY_TBL	DESCR	Con
Plan Type	PLAN_TYPE	Y	Detail Data 2	PSXLATITEM	XLATLONGNAME	Des
Company Provided Amount	TRW_CO_PROV_AMT	N	Company Provided			Esti
Leave Hours Balance	LEAVE_HRS_BALANCE	N	Units			Ren
Unit of Measure	TRW_UOM	N	Unit of Measure			Unit
Hourly Rate	HOURLY_RT	N	Rate Per Unit			Hou

Define Reward Data Source – Reward Output page

Reward Item Output Fields

Field Description Display only field that displays the field description of a field in the Extract temporary table. Fields are populated when the Extract Temp table is entered on the Rewards Data Source - Extract Tables page.

Field Name Display only field that displays the field name of a field in the Extract temporary table. Fields are populated when the Extract Temp table is entered on the Rewards Data Source - Extract Tables page.

Key Display only field that displays if the field name is a key in the Extract temporary table. Fields are populated when the Extract table is entered on the Rewards Data Source - Extract Tables page.

Detail Output Column

Fields from the Extract table can be mapped to a Detail Output Column that exists in the Statement Reward Item Detail table. The fields mapped to a Detail Output Column are the valid fields that can appear in the Reward Item Detail grid displayed in the My Total Rewards statement. Listed below are the valid values for the Detail Output Column:

- Detail Date
- Detail Data 1
- Detail Data 2
- Detail Data 3
- Detail Data 4
- Detail Data 5
- Employee Paid
- Employer Paid
- Units
- Unit of Measure
- Rate Per Unit
- Company Provided
- Related Detail Data 1
- Related Detail Data 2
- Related Detail Data 3

A Detail Output Column can only be mapped to one field from the Extract temporary table. In addition to this, one or more of the numeric reward data fields must be mapped (for example, Employee Paid, Employer Paid, Units, or Company Provided).

Detail Description Table

In order to translate a field value into a description to be displayed on the Reward Item Detail grid, a Detail Description table must be specified.

Detail Description Field

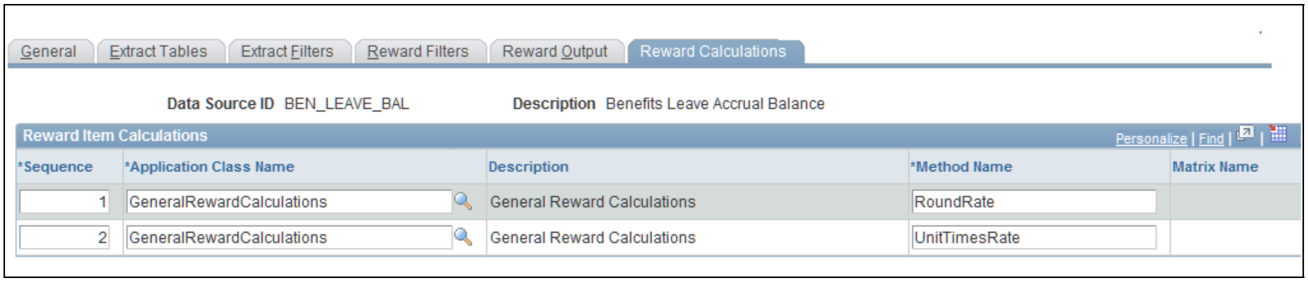
In order to translate a field value into a description to be displayed on the Reward Item Detail grid, a Detail Description field must be specified from the Detail Description table selected.

Detail Grid Column Label

For every field mapped to a Detail Output Column, a Detail Grid Column Label must be specified.

Defining Reward Data Source Reward Calculations

Access the Define Reward Data Source – Reward Calculations page (Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Data Source, Reward Calculations).



Define Reward Data Source – Reward Calculations

Reward Item Calculations

Sequence

Multiple calculations can be specified for the reward data source. The Sequence field controls the order in which the reward item calculations will be performed. For example, a reward data source for stock administration may require the calculation of exercisable shares, and then a calculation to calculate the estimated value of the exercisable shares.

Application Class Path

Enter the path of the application class to retrieve the calculation. Application classes are used to perform reward item calculations.

Description

Description of the application class.

Method Name

Enter the name of the method within the application class that will perform the calculation.

Matrix Name

Depending upon the selected application class, a matrix may be used to retrieve a rate the calculation requires. The matrix is specific to the application class and will require the user to specify a rate in that table for the reward statement being processed.

Note. Application Class must be registered under Application Class Registry found under Set Up HRMS, Product Related, Compensation, Utilities with the Class Usage set to REWARD CALCS.

Testing Reward Source Data

The extraction of reward data for a total reward statement can be challenging to set up and validate. The Test Reward Data Source component assists in validating and reviewing how data is extracted from a reward data source.

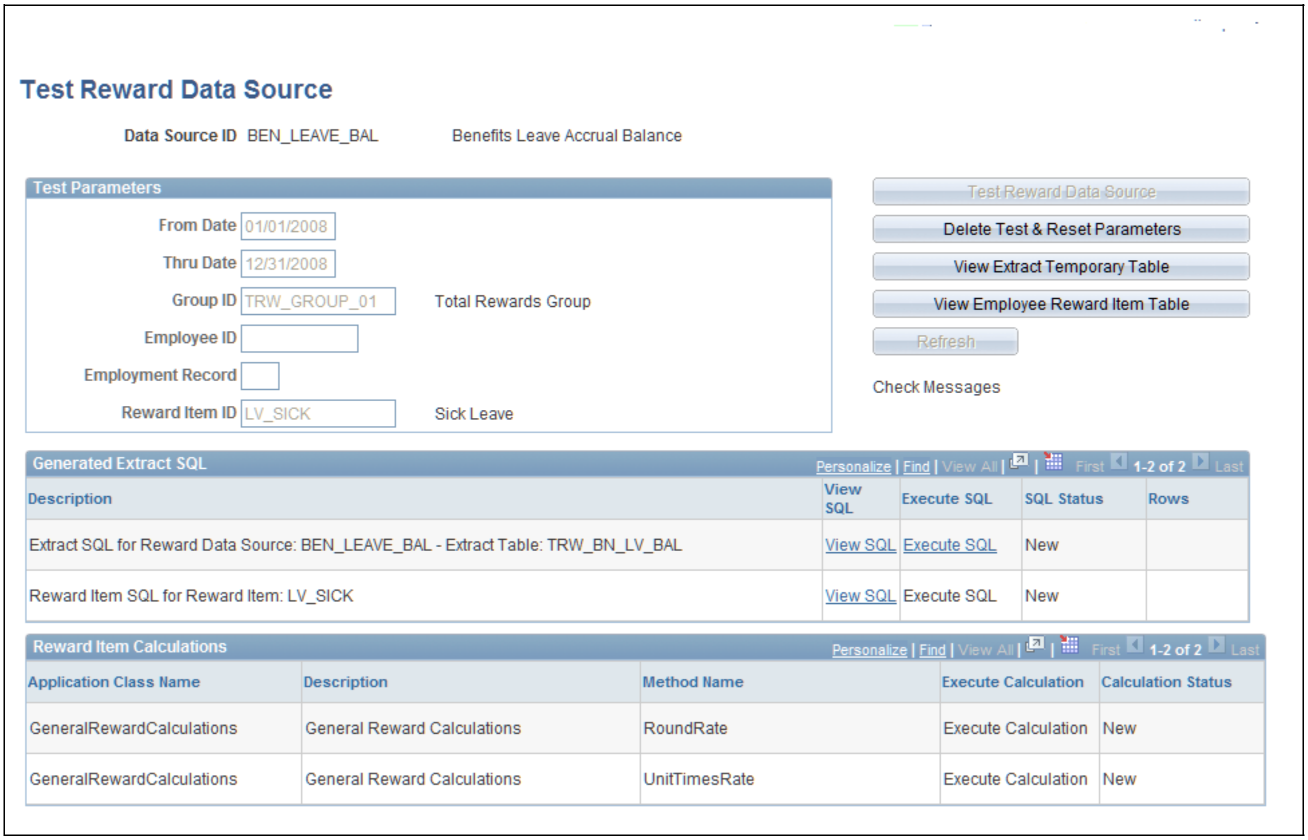
This component will accept test parameters similar to the test parameters to run a total reward statement. It will generate the SQL use to extract reward data into the Extract Temporary table. If you specify a reward item, it will also generate the SQL to extract data for the reward item.

On this page you will be able to view and execute the SQL, as well as view that data populated in the tables.

If the reward data source has reward calculations, then they will display when you test the reward data source. Reward calculations can only be executed if you have specified a reward item as a test parameter.

Note. If SQL errors are encountered on this page, then the error messages that are generated may not be specific to the actual problem with the SQL statement. Therefore, use the View SQL link to review the SQL statement generated and copy it into a SQL tool to identify the exact problem with the SQL statement.

Access the Test Reward Data Source page (Set Up HRMS, Product Related, Compensation, Total Rewards, Total Reward Utilities, Test Reward Data Source).



Test Reward Data Source page

Test Parameters

From Date	The start date that you want the system to use to test the reward data source.
Thru Date	The end date that you want the system to use to test the reward data source.

Group ID	The group ID that you want the system to use to test the reward data source. Note: If the group ID is specified, then the employee ID and employee record are disabled.
Employee ID	The Employee ID that you want the system to use to test the reward data source. Note: If the employee ID is specified, then the group ID will be disabled.
Employment Record	The employment record that you want the system to use to test the reward data source.
Reward Item ID	The Reward Item that you want the system to use to test the reward data source.
Test Reward Data Source	This button enables the user to submit the Reward Extract process in test mode through the Process Scheduler.
Delete Test & Reset Parameters	This button enables the user to delete the current reward data source test data. Clicking this button deletes the Extract SQL, Reward Item SQL, Reward Item Calculations, test data populated in the Extract Temporary table or Employee Statement Reward Item table, and any temporary queries.
View Extract Temporary Table	Clicking this button will create a temporary query and open a new browser to allow the user to view the data populated in the Extract Temporary table.
View Employee Reward Item Table	Clicking this button will create a temporary query and open a new browser to allow the user to view the data populated in the Employee Statement Reward Item table. Note: To generate the temporary query, the user needs to have proper query access to the Extract Temporary table and the Employee Reward Item table.
Refresh	When the Reward Extract process is running in test mode, this button is enabled to allow the user to refresh the test reward data source page. When the Reward Extract process is not processing, this button is disabled.
Check Messages	If the Reward Extract process or a Reward Calculation generates a warning or error to the Statement Message log table for the data source test processed, then the system enables the Check Message link. This enables the user to access a subpage to view the messages.

Generated Extract SQL

Description	A description of the Extract SQL generated for the reward data source test.
View SQL	Click this link to view the extract SQL generated for the reward data source test.

Execute SQL	Click this link to execute the SQL to populate either the Extract Temporary table or the Employee Statement Reward Item table. Extracting SQL based on an Extract table populates the Extract Temporary table. Extracting SQL based on a reward item populates the Employee Statement Reward Item table.
SQL Status	A description of the current status of the SQL statement displayed. Listed below are the valid SQL statuses: • F (Fail) SQL encountered an issue. Click View SQL to review generated SQL and determine if the Data Source requires changes to Extract or Reward Filter. • N (New) SQL is new and has not been executed. • S (Success) SQL has been successfully processed.
Rows	Displays the number of rows inserted into the Extract Temporary table or the Employee Statement Reward Item table.

Reward Item Calculations

Application Class Name	Displays the application class for the reward calculation.
Description	Displays the description of the application class.
Method Name	Displays the method name within the application class that will be executed to perform the reward calculation.
Execute Calculation	Click this link to enable the user to execute the reward calculation.
Calculation Status	Displays a description of the current status of the reward calculation. Listed below are the valid calculation statuses: • F (Fail) Reward calculation encountered an issue. • N (New) Reward calculation is new and has not been executed. • S (Success) Reward calculation has been successfully processed.

Note. Depending upon the design of the reward calculation, messages may be written out to the Statement Message Log table when an error is encountered. In this scenario, the Check Message link is activated to allow the user to view any warning or error messages.

Defining Reward Items

This section provides information on understanding reward items, common elements, examples, and describes how to define reward items.

Understanding Reward Items

A reward item not only identifies the data source to the system, it provides the properties and behaviors that are used by the data source when generating results data for the employee. In this application, for every reward item there must be a corresponding data source.

Defining Reward Items

Beyond a basic ID and description, a reward item essentially provides the ability to configure three pieces of metadata that are used by the Generate Statements process:

- The identifier of the data source.
- The input filters to be applied by the data source to retrieve the correct rows of data.

The target output column that will be used to displayed the retrieved values. A reward item can support one, two or three possible output columns:

- Employer Paid
- Employee Paid
- Company Provided This is controlled by data source definition.

Example

This table highlights a series of typical examples that represent likely combinations of the three possible columns that can be configured:

Reward Item Name	***Employer Paid***	***Employee Paid***	***Company Provided***
Base Salary	Payroll for North America Earnings 85,000.00 USD		
Medical Benefits	Payroll for North America Deductions 2,500.00 USD	Payroll for North America Deductions 2,500.00 USD	
Stock Options			Stock Administration 12,000.00 USD
Holidays			(Default Values Only) 260.00 USD
Leave Accrual	Benefit Leave Accrual 390.00 USD		

Reward Item Name	Employer Paid	Employee Paid	Company Provided
Company Provided Phone/Service 500.00 USD			External Source
Free Parking			

Notice that the majority of examples only display a value in one column. It is very unlikely that there will be any scenario that will use all three columns.

Common Elements Used in this Section

Reward Item A specific item of compensation displayed on the employee's total compensation statement.

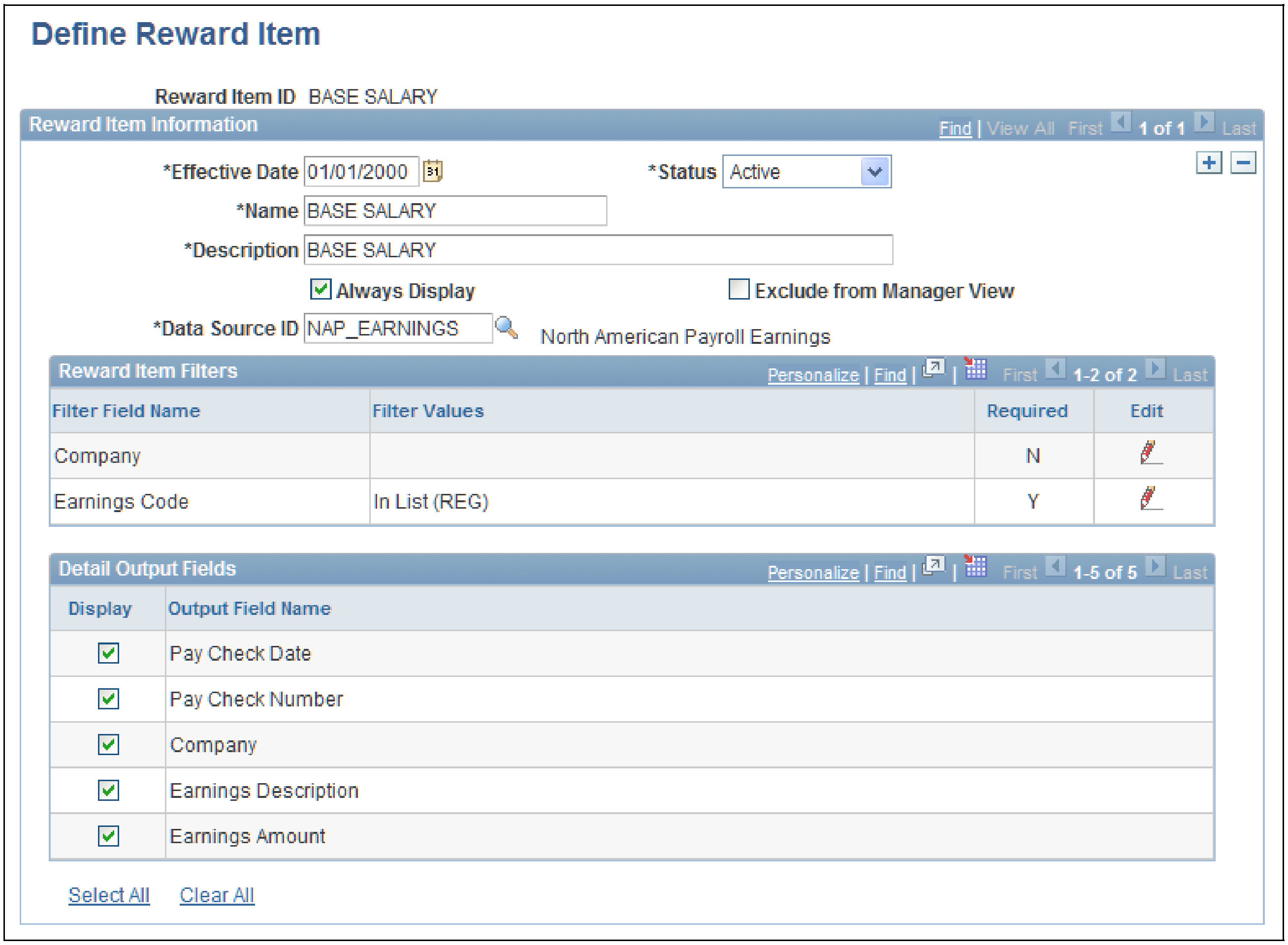
Data Source A setup component that defines how the data loads to the Extract temp table. It also further defines filter and output fields that can be used in the Reward Item setup.

Page Used to Define Reward Items

Page Name	Definition Name	Navigation	Usage
Define Reward Item	TRW_RW_ITEM_DEFN	Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Item	Enables users to create new reward items or modify existing reward items. Note: Access should be provided to only those designated as compensation administrators.

Defining Reward Items

Access the Define Reward Item page (Set Up HRMS, Product Related, Compensation, Total Rewards, Define Reward Item).



Define Reward Item page

Reward Item ID

A unique, user-specified identifier for the reward item, this field can support a maximum of 15 characters. This value is read-only on the page as it is entered by the user on the Add a New Value tab on the Search Dialog page.

Effective Date

The initial default value is today's date. The effective dated reward items work together with the effective dated template to generate a statement for a certain period. The statement through date is used as the As of Date to retrieve the effective dated template. The effective date on the template is, in turn, used to retrieve effective dated items. Usually statements are generated with begin and through date in the past, so most likely the administrator will use an effective date that is in the past but before the through date.

Status

Indicates the effective date status. This field uses one of two values: Active or Inactive. The initial, default value is Active.

Name

A short description that identifies a reward item. This field supports a maximum of 25 characters.

Description	A long description name that provides details regarding a reward item. This field supports a maximum of 50 characters.
Always Display	An indicator that specifies if the reward item must be displayed on the total rewards statement, even if there are no results found for the employee in the result table. The initial default value for this indicator is FALSE or deselected.
Exclude From Manager View	An indicator that specifies if the reward item is excluded from the manager view. When the check box is selected, managers are not able to see the reward item when viewing the direct report's total reward statement. By selecting this indicator, this item will only display for the employee's My Total Reward statement. The initial default value for this indicator is FALSE or deselected.
Data Source ID	This is a prompt view that lists all of available data sources that can be selected for the reward item. All data sources that are configured in Define Reward Data Source setup component are valid data sources in the prompt. A data source can be configured to contain the employer paid amount, employee paid amount, company provided amount, or any combination of the three. It will be listed in the Detail Output Fields grid. If the Reward Item Filters and Detail Output Fields have not been previously specified, changes to the data source will load the Data Source Filters and Detail Output Fields grids without error. Changes to the data source, when rows exist in any of the Reward Item Filters or Detail Output Fields grid, will cause the following warning message to occur: *Reward Item Filters/Detail Output Fields have been defined for the Data Source. This action will reload specified Reward Item Filters/Detail Output Fields based on newly selected Data Source. Do you want to continue?* If you acknowledge Yes, the Reward Item Filters and Detail Output Fields are repopulated based on the new data source selected. If you do not wish to continue, you can cancel the action. The Reward Item Filters and Detail Output Fields stay the same, and the data source is not changed.

Reward Item Filters

This grid enables you to specify the filter criteria values that need to be applied to properly retrieve the correct data from the data source. Data source specifies what fields can be configured as filter fields, whether it's a required filter, and the prompt view of the filter field.

Reward Item Filter Name is systematically populated after a data source has been selected. Rows cannot be added or deleted manually from the grid. Filter values are entered by clicking the Edit icon.

Filter Field Name

The long label associated with the Filter field that requires some filter criteria. This field is read-only. The label is displayed based on user language.

Filter Values

A simple, concatenated list of the filter criteria or key values that have been specified by the user. This field is read-only. Click the Edit link to enter or modify the value. Filter values include different operators such as In List, Not In List, Equal to Blank, Not Equal to Blank, and so on.

Concatenated strings are displayed with values – without quotation markings – and are separated with a comma. The system wraps long, concatenated strings within the column width.

Required

This field displays either Yes or No to indicate if the filter field requires at least one filter value. It is read-only.

Data source specifies whether a filter field is required or not. If a filter field is required, the administrator has to specify at least one value in the reward item setup; or specify that the value is not empty from the operator. You cannot save the page if the value is left blank.

 **Edit**

Click to launch a dialog box that enables you to specify filter values. This icon is always enabled for selection.

Detail Output Fields

The Output grid enables you to select the fields (grid columns) that will be visible when displaying the results details on the total rewards statement.

The results output fields are defined by data source. This grid displays all of the available output fields that can be applied when presenting the results data from the reward item on the My Total Rewards statement. The administrator can further select what fields to display on reward item details.

Note. The display order of fields is controlled from the data source definition. Reward item setup can't rearrange the position of each output column to display on the My Total Rewards statement.

Output fields are controlled by selected data source. Rows cannot be added or deleted from the grid.

The default for output fields is to have the check box selected but you can decide whether to exclude it on the Reward Item Detail page or not.

All rows are displayed on the page. The View All configuration option is not visible.

Output Field Name

Display grid column label of the field name defined in the data source. The label is configured in the data source definition. The value is displayed based on the user's language.

Display	A check box that can be selected to enable the display of the column on the My Total Rewards Item Details grid. The default value is set to TRUE (selected). A data source can apply to Employer Paid, Employee Paid, Company Provided, or any combination of the above. At least one Employee Paid, Employer Paid, or Company Provided amount field has to be selected. When you click Save, the system makes sure at least one amount is selected, otherwise the system displays an error message.

Defining Total Reward Templates

This section provides an understanding section and discusses how to:

- Define Total Reward templates.
- Review the Total Rewards Statement charts.

Understanding the Total Rewards Template

On the Define Total Rewards Template page, compensation administrators design the layout of Total Rewards Statement. These designs are called templates. The system uses them in the processes that generate the Total Rewards statement for an employee population.

When a new template is created, the system automatically enters the statement's sections and all the labels texts. Because the system does this for you, you can create a template very quickly. All a compensation administrator would need to do after this process has completed, would be to select a compensation item for each non-summary section. Compensation administrators can remove or add sections, change the section label text, change the section sequence, remove or add sections, and set a summary section.

The template elements that are defaulted in include:

- All header area label texts.
- Six sections sets:
    - Summary
    - Cash Pay
    - Health and Wellness
    - Retirement Savings
    - Company Stock
    - Other Benefits
- Label texts for all sections.

- Editable chart types set to 2D Pie for the Summary section.
- Chart check boxes deselected for all non-summary sections.
- Grid columns label texts for all grids.

Note. All the label texts are defaulted in as Other Benefits when a new section is added by the compensation administrator.

The template elements that must be added by the administrator when adding or creating new templates include:

- Template identification.
- Template description.
- Reward items.

Note. Reward items must be unique for the combined sections. For example, if reward item Regular Salary is selected in the Cash Pay section, then this same item cannot exist in any other section.

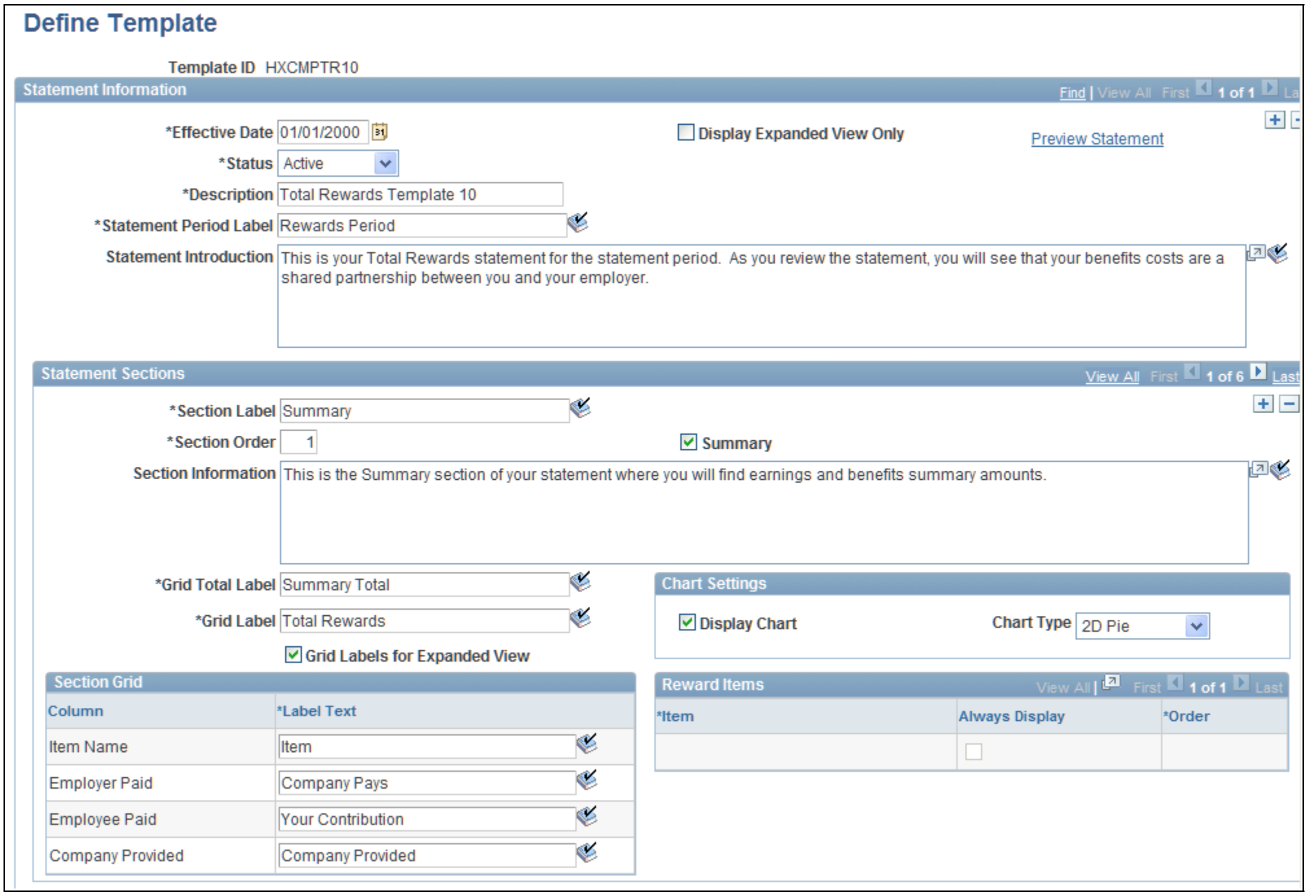
A Total Rewards Template defines how a total rewards statement will be presented to the employee in self service.

Pages Used to Define the Total Rewards Statement

Page Name	***Definition Name***	***Navigation***	***Usage***
Define Template	TRW_TEMPLATE_DEFN	Set Up HRMS, Product Related, Compensation, Total Rewards, Define Template	Enables compensation administrators to configure the layout of the total rewards statement.
My Total Rewards	TRW_SS_STMT_TABS	Click the Preview Statement link on the Define Template page.	Preview the Total Rewards Statement for a particular employee.

Defining Total Reward Templates

Access the Define Template page (Set Up HRMS, Product Related, Compensation, Total Rewards, Define Template).



Define Template page

Template ID

Specified by the compensation administrator, the Template ID field identifies the total rewards statement configuration and is a key element needed when processing or generating statements for an employee population. A template ID is entered in the Add Search page when creating a new template or in the Search page when looking for an existing template.

Display Expanded View Only

Select this check box to enable employees to view the tabbed or expanded page format. The default value for this field is deselected. If this check box is cleared, the employee will be able to view the statement in the tabbed format or online view, and there will be a link on the statement that toggles between Tabbed View and Expanded View. If this check box is selected, the employee can view the statement in expanded format only.

Preview Statement

Specified by the compensation administrator to set how the statement will display to employees in self service.

Two formats or styles of the My Total Rewards statement are available. It is up to the compensation administrator to specify whether to display the tabbed or expanded page format only. The default value for this field is deselected:

- When the Display Expanded View Only check box is selected, then the employee views the expanded or long page format in self service.
- When the Display Expanded View Only check box is deselected, then the employees views the tabbed format view, and they can toggle between the tabbed view and the expanded view.

Description

Specified by the compensation administrator to describe the template, the description can be changed at any time.

Statement Period Label

The default statement period label for the rewards period.

Statement Introduction

The default statement introduction text is displayed in the edit box. The administrator may change it. All statement attributes that are configurable are in this scroll area.

Statement Sections

Section Label

Describes the section.

Note. For the pre-defined sections (Cash Pay, Health and Wellness, Retirement Savings, Company Stock, and Other Benefits) the fields are essentially the same except the field values correspond to each section type.

Section Order

The section sequence determines the order in which the sections will appear in the My Total Rewards statements. When new templates are created, section sequence is the same as the scroll row number. The default is the scroll row number.

Summary

The summary check box identifies the section that will be designated as the statement summary section. Only one section can have the summary check box selected. Summary sections summarize the contents of the other sections, so if a summary section is defined, then there must be at least one other non-summary section defined in the template.

When the Summary check box is selected, then the Reward Items grid is disabled. Chart Settings are only enabled for summary section.

Statement Information

The default statement introduction text that is displayed in the edit box. The administrator may change it, however.

Grid Total Label	The default grid total label for the section. This is the label for displaying the total line of the section. For instance, Summary Section has Summary Total as default label for the total line.
Grid Label	The default grid label for the section grid title.
Grid Labels for Expanded View	For Expanded View, there is a limitation. The system can't display different grid labels for different sections. Select this check box so the system will use the labels defined in this section to display the grid labels in the expanded view.

Chart Settings

Display Chart	Select this check box if you want to display a chart on the My Total Rewards statement. This is only available in the Summary Section.
Chart Type	Select one of these values to indicate the type of chart that you want the employees to view: • 2D Bar • 2D Pie • 3d Bar • 3D Pie

Section Grid

Column	List columns in the section grid.
Label Text	Enter the text that you want the system to display for each grid column header on the My Total Rewards statements for the employees. You can change these labels for each section.

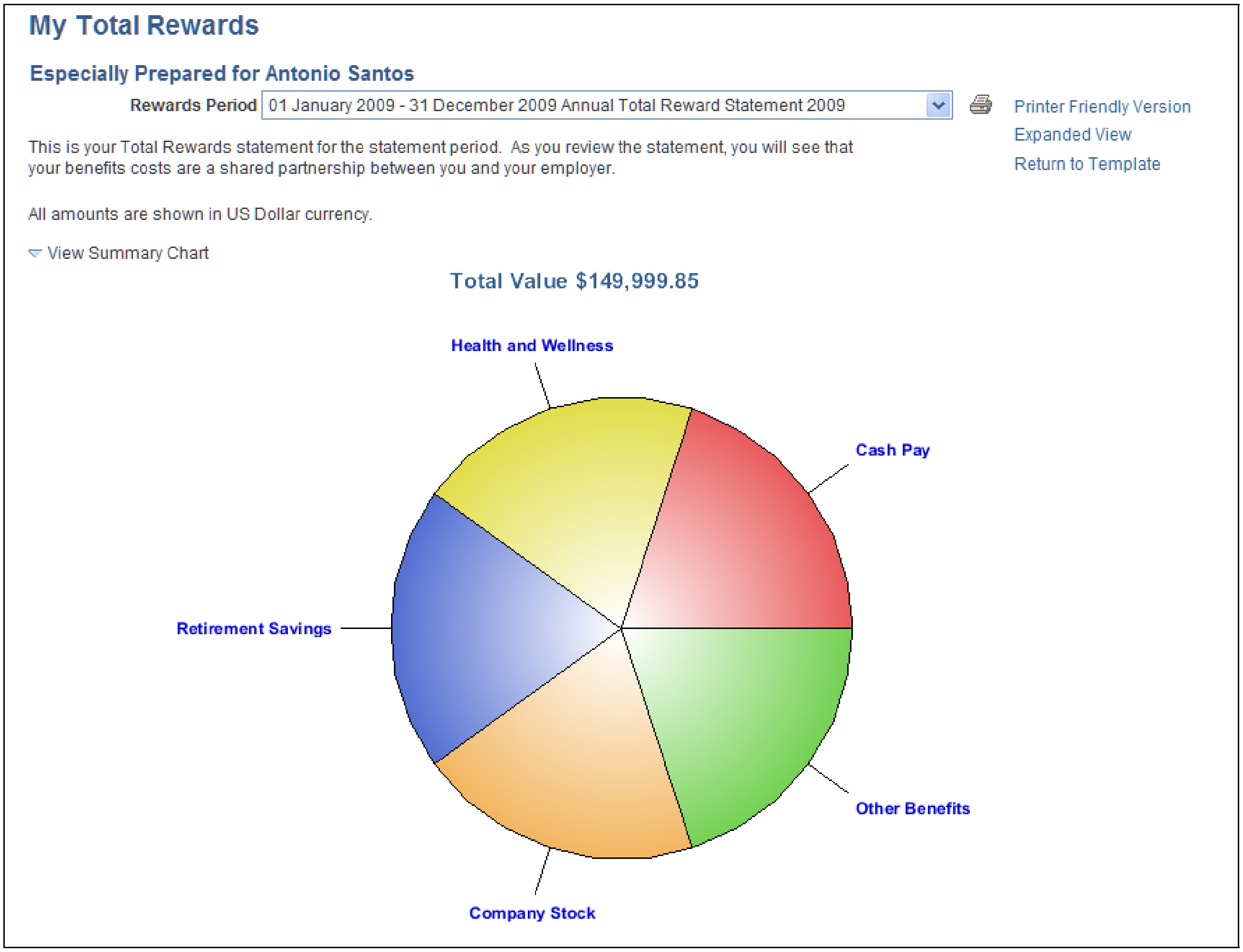
Reward Items

This section is used to identify the reward items for each section grid. When you select the Summary check box, the Reward Items grid is disabled since the content is derived from the non-summary sections.

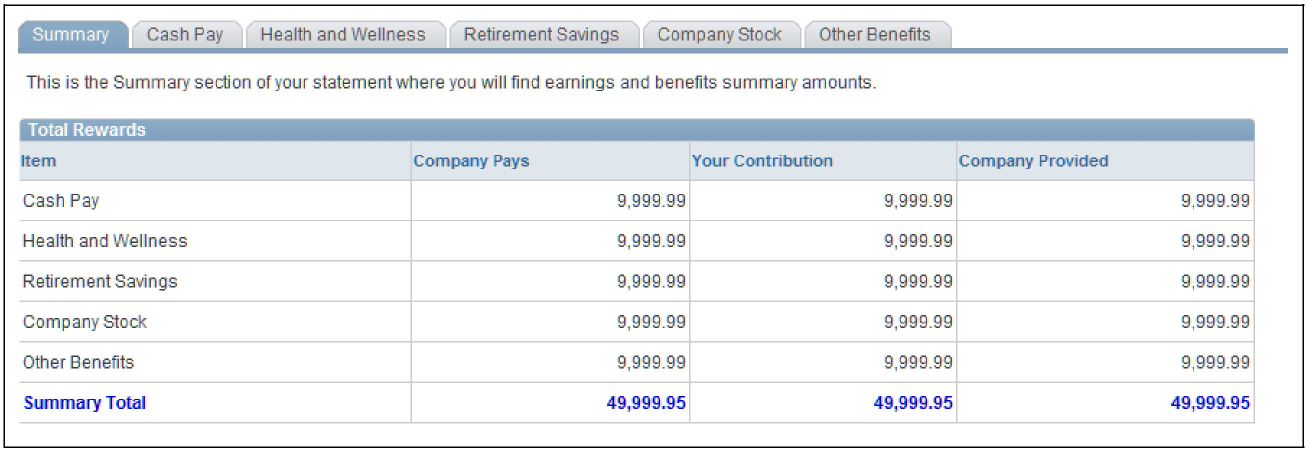
Always Display	This will be defaulted in from the Reward Item definition into the non-summary sections.
Order	The grid order determines the order in which the reward items will appear in the grid. For the Summary section, the order will be set to match the order of the non-summary sections.

Reviewing the Total Rewards Statement

Access the Define Template page (Set Up HRMS, Product Related, Compensation, Total Rewards, Define Template) and then click the Preview Statement link.



My Total Rewards Statement (1 of 2)



Item	Company Pays	Your Contribution	Company Provided
Cash Pay	9,999.99	9,999.99	9,999.99
Health and Wellness	9,999.99	9,999.99	9,999.99
Retirement Savings	9,999.99	9,999.99	9,999.99
Company Stock	9,999.99	9,999.99	9,999.99
Other Benefits	9,999.99	9,999.99	9,999.99
Summary Total	**49,999.95**	**49,999.95**	**49,999.95**

My Total Rewards Statement (2 of 2)

The labels defined in the template are displayed in the statement. Also a BI publisher report is launched when you click the View Printer Friendly Version link or the Printer icon on the Total Rewards Statement page.

See Also

PeopleTools 8.52: BI Publisher for PeopleSoft PeopleBook

Defining External Reward Data

This section provides information on how to:

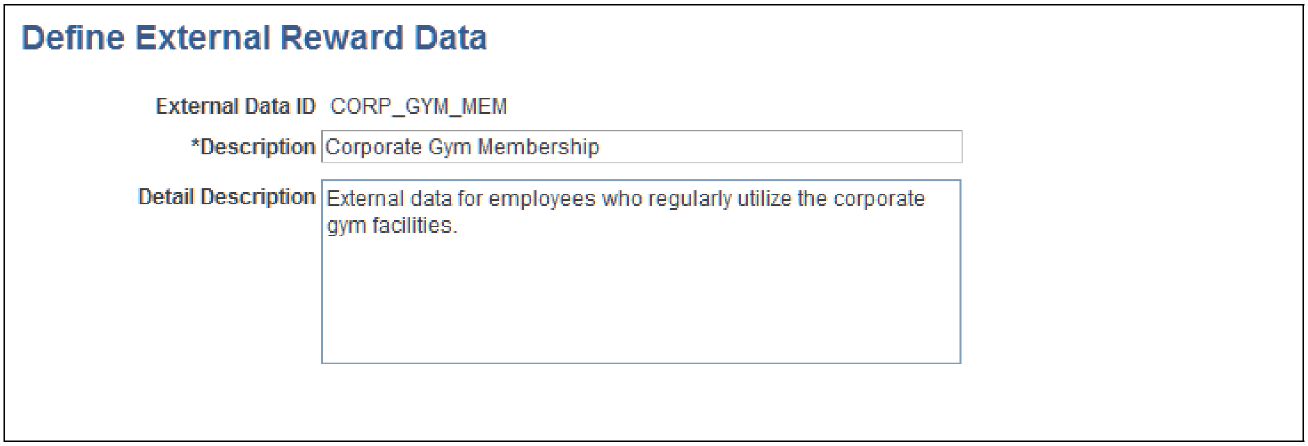
- Define external reward data.
- Update external reward data.

Pages Used to Define External Reward Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Define External Reward Data	TRW_EXTDATA_TBL	Set Up HRMS, Product Related, Compensation, Total Rewards, Define External Reward	Enables the user to define an External Data ID that will identify the external data loaded into the External Rewards Data table.
Update External Reward Data	TRW_EXTERNAL_DATA	Compensation, Total Rewards, Update External Rewards Data	Enables the user to enter a general description, a detail description, and a high level data source category for the reward data source.

Defining External Reward Data

Access the General Information page (Set Up HRMS, Product Related, Compensation, Total Rewards, Define External Reward).



Define External Reward Data page

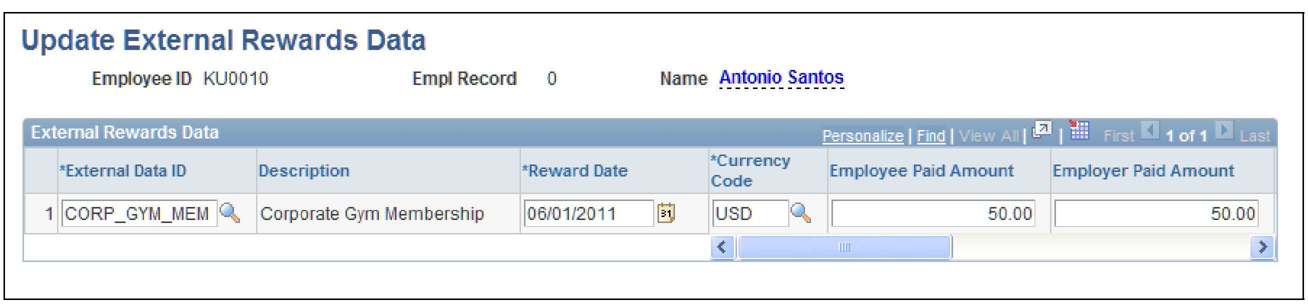
External Data ID An abbreviation that uniquely identifies external rewards data.

Description A description of the external reward data that will be displayed in the total rewards detail.

Detail Description A detail description providing a functional explanation of the external rewards data that is being loaded into the External Rewards Data table.

Updating External Reward Data

Access the General Information page (Compensation, Total Rewards, Update External Rewards Data).



Update External Rewards Data page

External Data ID An abbreviation that uniquely identifies external rewards data.

Description A description of the external reward data ID.

Rewards Date	Date the reward was granted to the employee.
Employee Paid Amount	The amount the employee paid or contributed to for the external reward data.
Employer Paid Amount	The amount the employer paid or contributed to for the external reward data.
Company Provided Amount	The amount the company provided for the external reward data.
Units	The number of units for the external reward data. Unit of Measure The Unit of Measure that displays for the external rewards data. The following is a list of the units of measures delivered: • 001 – None • 002 – Hours • 003 – Days • 004 – Weeks • 005 – Months • 006 – Stock Shares
Currency	The currency for the external reward data.

Administering the Total Rewards Statement Process

This chapter provides two understanding section and discusses how to:

- Define and processing rewards statements.
- Validate external data.
- Run the rewards extract run control process.
- Run the rewards build run control process.
- Publish statement summary information.
- Amend total reward statements.
- Review warnings and error messages.
- View statement summary information.

Understanding the Processing of Total Rewards Statements

PeopleSoft enables the compensation administrator to manage the end-to-end process of generating a total rewards statement after they have defined and setup these data elements:

- Group ID Definition - Group IDs are used to identify the employee population that will receive a total reward statement
- Reward Items - Represent an item of compensation received by the employee. Reward items are associated with a reward data source that contains attributes about how that reward data is extracted. Depending upon the reward data source definition, the compensation administrator can specify reward item filters to further control the reward data extracted. Finally, the reward item controls the detailed output columns that are displayed in the My Total Rewards page.
- Template ID – These IDs organize and format reward items that appear in a total rewards statement.

The end-to-end process of generating a total rewards statement includes:

- Validating that external rewards data has been populated.
- Initiating the Application Engine Rewards Extract process.
- Reviewing any Rewards Extract warnings or errors.
- Initiating the Application Engine Rewards Build process.
- Reviewing any Rewards Build Process warnings or errors.
- Publishing the total rewards statement to My Total Rewards self service.
- Amending total reward statements, if necessary

Understanding the Reward Extract Process

Here is a detailed explanation of what the system does when the Reward Extract Process is generated:

Step	***Actions***
Performs critical validations against reward data sources	The reward data sources utilize records and views defined in Application Designer. The system performs validations to ensure that records and views exist and are defined properly to retrieve reward data.
Processes group IDs	Retrieves the employee population for the statement being generated.
Initializes employee reward statement tables	The system populates the these tables: • Employee Statement Table (TRW_EE_STMT) • Employee Statement Jobs Included Table (TRW_EE_STMT_JBI)

Step	***Actions***
Performs employee validations	If the employee has multiple statements, the system validates the From and Thru date being processed. If true, the system generates warnings. If the employee has one HR primary job, the system performs a validation. If true, the system generates an error. The system uses the primary job to retrieve the currency the employee's statement is displayed in.
Sets Multiple Jobs Indicator	If an employee has multiple jobs, the system displays the job title in the reward item detail.
Generates SQL for the Extract table	For each unique reward data source associated with the template, the Reward Extract process constructs SQL to extract reward data from the Extract table(s) defined in the reward data source. The SQL constructed uses the extract filters to only retrieve rewards data for the statement being processed. The SQL also populates the Extract Temporary table defined in the reward data source.
Executes SQL for the Extract table	For each unique reward data source, the system populates the respective Extract Temporary table.
Generates SQL for reward items	For each reward item in the template, the system generates SQL to the extract reward item from the Reward Data Source Extract Temporary table The SQL, when constructed, uses the reward item filters to only retrieve reward data for the specific reward item. This SQL also populates the Employee Statement Reward Item table (TRW_EE_STMT_ITM).
Executes SQL for reward items	For each reward item SQL generated, the system executes the statement to populate the Employee Statement Reward Item table (TRW_EE_STMT_ITM).
Calculates reward items	The system performs any reward item calculations against the Employee Statement Reward Item table (TRW_EE_STMT_ITM). Note: The system deletes the data in the Extract Temporary tables for the statement being processed.
Validates rewards item details	The system generates warning messages for reward items that were not extracted for the statement.
Updates extract statistics	The system populates the Reward Summary table (TRW_STMT_RWDSUM). The system counts and summarizes the number of employees with extracted reward items.
Updates the statement status	If errors occurred, the system sets the Statement Status to Reward Extract Error. The system also enables the Check Messages link on the Administer Statement page. If there are no errors, the system sets the Statement Status set to Reward Extract Complete.

Step	Actions
Generates a detailed output log file accessible through Process Monitor	See TRW_RWD_EXTRACT_INFO.txt

Note. When initiating the Reward Extract process to amend a specific list of employee's, the steps are basically the same except for the status the statement assigned. The Statement Status assigned will be Amend Extract Error or Amend Extract Complete.

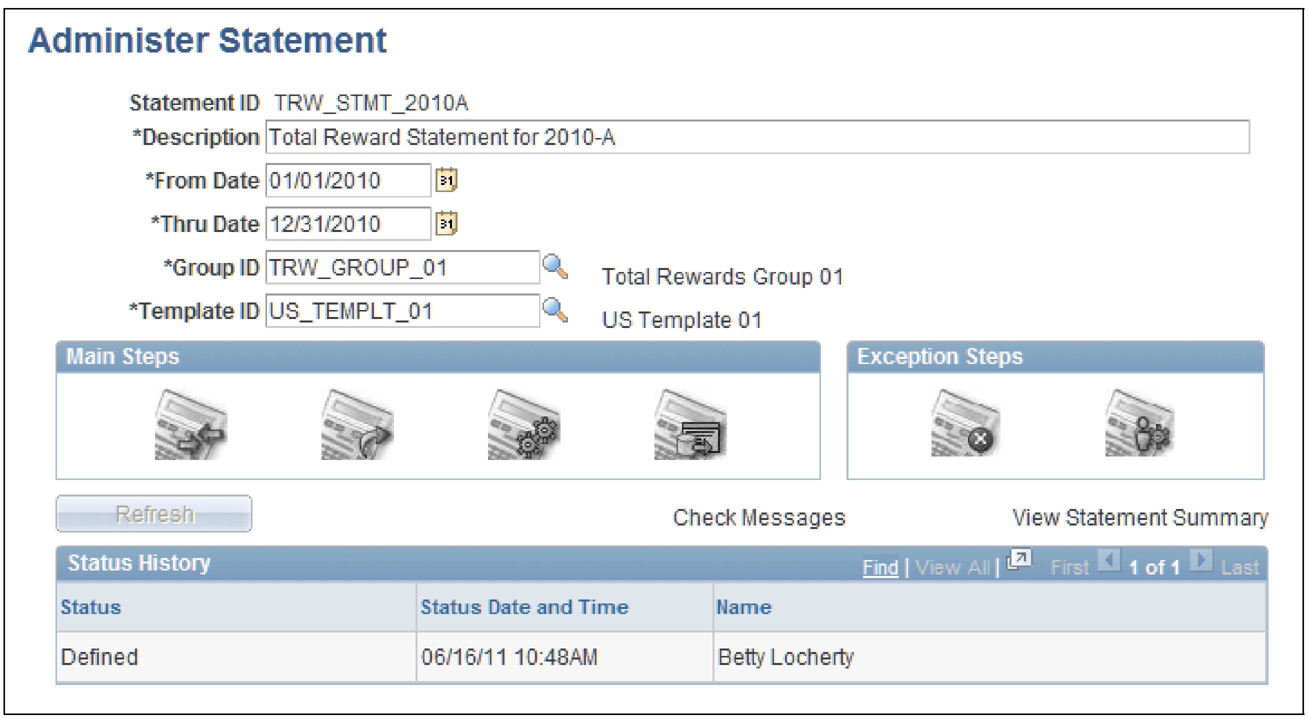
Pages Used to Define and Process a Total Rewards Statement

Page Name	Definition Name	Navigation	Usage
Administer Statement	TRW_ADM_STMT	Compensation, Total Rewards, Administer Statement	Enables the compensation administrator to define and process a total rewards statement. As the compensation administrator performs the main process steps to generate a total rewards statement, the statement status is updated and certain data fields and buttons are enabled or disabled based on the status.
Validate External Data	TRW_STMT_VAL_EDATA	Click the Validate button on the Administer Statement page.	Identifies any external reward items associated with the specified template ID. An external reward item is defined as any reward item associated to a reward data source that has the data source category set to EXT for External Rewards.
Extract Total Rewards Data	TRW_EPRC_RUNCTL	Click the Extract button on the Administer Statement page.	Extract reward data for specific total rewards statement by generating SQL that extracts rewards data based on the reward data source attributes.
Rewards Build Run Control	TRW_BPRC_RUNCTL	Click the Build button on the Administer Statement page.	Identify issues with processing an employee's statement.
Publish Statement	TRW_STMT_PUBLISH	Click the Publish button on the Administer Statement page.	This page is used to publish all built total rewards statements to the employee self service My Total Rewards page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Amend Statement	TRW_STMT_AMEND	When the statement has reached the Published status stage, click the Amend Statement button on the Administer Statement page.	This page enables the compensation administrator to amend or cancel individual employee total rewards statements.
Administer Statement Messages	TRW_STMT_MESSAGES	Click the Check Messages link on the Administer Statement page.	Displays any warnings or errors generated by the Rewards Extract and Rewards Build processes. The compensation administrator is expected to review warnings and error messages and cancel the statement to make any adjustments to the configuration or data to correct the problem.
Statement Summary	TRW_STMT_SUMMARY	Click the View Statement Summary link on the Administer Statement page.	Displays statistical summary information on what has been processed to date for the statement.

Defining and Processing Rewards Statements

Access the Administer Statement page (Compensation Total Rewards Administer Statement).



Administer Statement page

The Compensation Administrator can add a new Statement ID and specify the following fields:

Statement ID	An abbreviation that uniquely identifies the total rewards statement to be generated.
Description	A description of the total rewards statement.
From Date and **Thru Date**	These fields are enabled if the Status field is Defined or External Data Validated. The From and Thru Date fields identify the period use by the Rewards Extract process to extract rewards information that will be displayed on the total rewards statement.
Group ID	Group ID defines the population of employee who will be processed for the My Total Rewards statement.
Template ID	This field identifies the structures of the total rewards statement; specifically, the reward items that will be extracted and displayed on the total rewards statement.

Statement Status

This is a display-only field. As the rewards statement is processed, the Status field will change to one of the following:

- *Defined* - Initial status after the Statement ID has been saved.
- *External Data Validated* - Assigned when the compensation administrator confirms all external data has been loaded into PeopleSoft.
- *Extract Rewards Complete* - Assigned when the Rewards Extract process has completed.
- *Extract Rewards Error* - Assigned when the Rewards Extract process encounters an error that requires the compensation administrator to correct a problem.
- *Build Reward Complete* - Assigned when the Rewards Build process has completed.
- *Build Reward Error* - Assigned when the Rewards Build process encounters an error that requires the compensation administrator to correct a problem.
- *Reward Statement Published* - Assigned when the compensation administrator publishes the total rewards statements to the employee self service My Total Rewards.
- *Statement Cancelled* - Assigned when the compensation administrator decides to cancel a statement.
- *Amend Extract Complete* - Assigned when the Reward Extract process completes extracting reward data for amended employees
- *Amend Extract Error* - Assigned when the Reward Extract encounters an error extracting reward data for an amended employee and requires the compensation administrator to correct the problem.
- *Amend Build Complete* - Assigned when the Reward Build process completes the building of a total reward statement for an amended employee.
- *Amend Build Error* - Assigned when the Reward Build process encounters an error building a total reward statement for an amended employee and requires the compensation administrator to correct the problem.

Refresh

Displayed, when the Rewards Extract or Rewards Build process is running. The compensation administrator can click this link to see if the process has completed.

Check Message

Displayed if the Reward Extract or Rewards Build process generated a Warning/Error message. The system transfers the compensation administrator to the Statement Messages page, which displays any warning or error messages that require the attention of the compensation administrator.

View Statement Summary

Displayed if the statement status is not defined or cancelled. The system transfers the compensation administrator to the Statement Summary page, which details various statistics for the statements being processed.

Main Steps

Validate

Enabled if the statement status is Defined or Statement Cancelled. The system transfers the compensation administrator to the Validate External Data page, which will identify reward items from the specified Template ID that is associated to a data source that is external to PeopleSoft. If external reward items exist, then the compensation administrator must confirm that all external data has been loaded into PeopleSoft.

Extract

Enabled if the statement status is Defined (no external data is validated), External Data Validated, or the amended employee is set to Amend Indicator of Extract. The system transfers the compensation administrator to the Rewards Extract Run Control component so they can submit the Rewards Extract process through the PeopleSoft Process Scheduler.

Build

Enabled if the statement status is Rewards Extract Complete, or the amended employee is set to Amend Indicator of Build. The system transfers the compensation administrator to the Rewards Build Run Control component so they can submit the Rewards Extract process through the PeopleSoft Process Scheduler.

Publish

Enabled if the statement status is Build Rewards Complete, or the amended indicator is set to Amend Indicator of Publish. The system transfers the compensation administrator to the Publish Statement page, which will enable the compensation administrator to publish total rewards statements to My Total Rewards.

Note. There is an order of precedence for enabling the main process steps when amending employees. For example, if an employee has Amend Indicator of Extract and another employee has Amend Indicator of Build, then extract will be enabled first, and the build will be enabled after the extract completes.

Exception Steps

Cancel

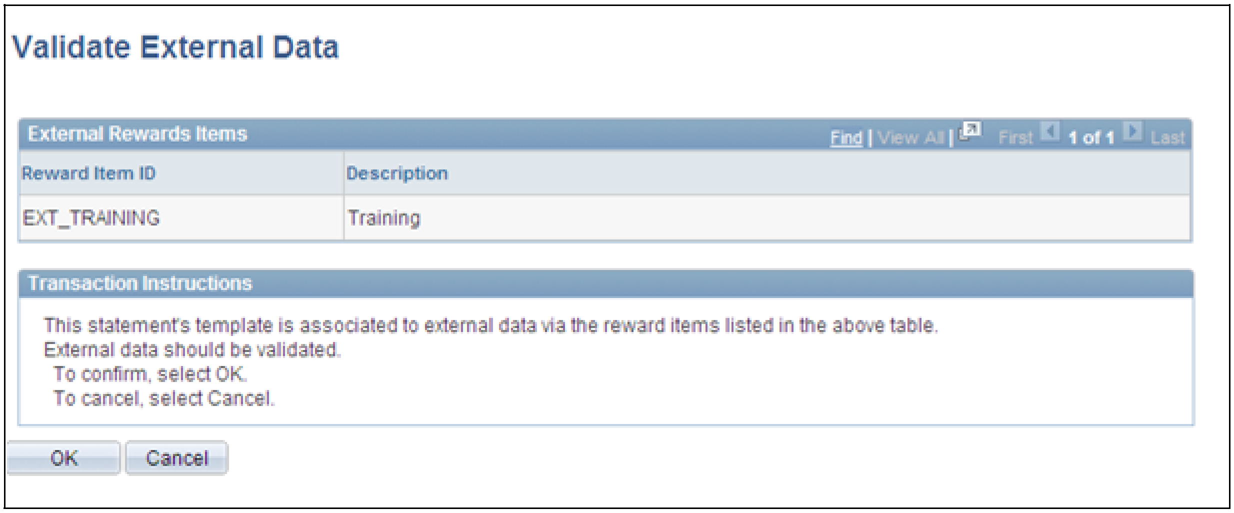
Enabled if the statement status is not equal to Defined, The system displays a statement confirmation page indicating to the compensation administrator the impact of canceling the statement.

Amend

Enabled if the statement status is Rewards Statement Published. The system transfers the compensation administrator to a page, which will enable the compensation administrator to cancel and reprocess an employee's total rewards statement.

Validating External Data

Access the Validate External Data page (click the Validate push button on the Administer Statement page).



Validate External Data page

This page serves as a reminder to the compensation administrator that external reward items are associated to the template being used to generate a total reward statement and to verify that external rewards data has been loaded into PeopleSoft.

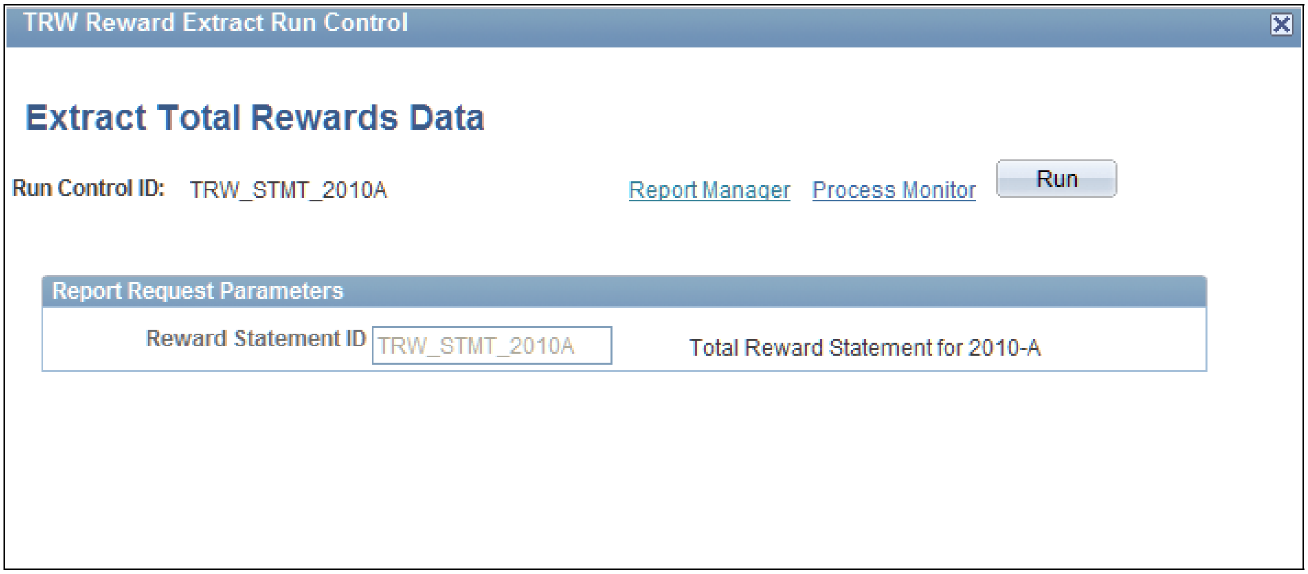
External Reward Items

Reward Item ID An abbreviation that uniquely identifies the total rewards statement to be generated.

Description A description of the total rewards statement.

Running the Rewards Extract Run Control Process

Access the Extract Total Rewards Data page (click the Extract icon on the Administer Statement page).



Extract Total Rewards Data page

Note. If the compensation administrator has amended individual total rewards statements for the Extract Process, the system displays a grid detailing the amended employees who are ready to be extracted.

Reward Statement ID

An abbreviation that uniquely identifies the total rewards statement to be generated.

Description

A description of the total rewards statement.

Amend Statement for Employees

Employee ID

Displays the ID of the employee who is ready to be extracted.

Name

Displays the name of the employee.

Statement Status

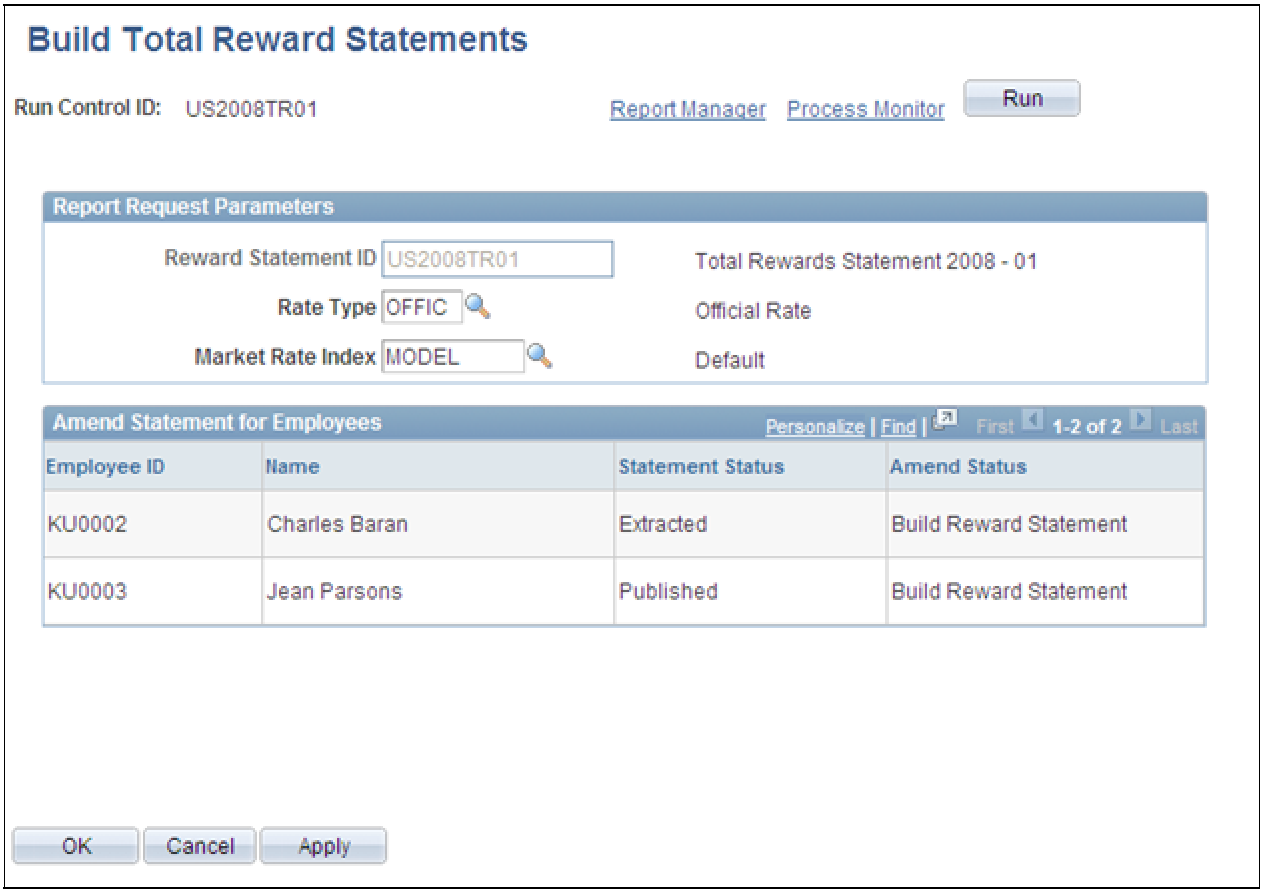
Displays the current status of the employee's total reward statement

Amend Status

Displays the amend statement status. For pages that contain specific employee information, it should only display those amended employees that are ready to be extracted.

Running the Rewards Build Run Control Process

Access the Build Total Reward Statements page (click the Build icon on the Administer Statement page).



Build Total Reward Statements page

Note. If the compensation administrator has amended individual total rewards statements for the Build Process, the system displays a grid detailing the amended employees who are ready to have their total reward statements built.

Rate Type

A required field that specifies the currency conversion rate to use if a reward items requires currency conversion to the employee's primary job currency.

Market Rate Index

A required field that details the currency conversion index to use if a reward item requires currency conversion to the employee's primary job currency. For more information, see *PeopleSoft HCM 9.1 PeopleBook: Components, Working With Currencies and Market Rates, Understanding Currencies and Market Rates.*

Amend Statement for Employees

Employee ID

Displays the ID of the employee who is ready to have their Total Reward Statements built.

Name

Displays the name of the employee.

Statement Status Displays the current status of the employee's total reward statement.

Amend Status Displays the amend statement status. For pages that contain specific employee information, it should only display those amended employees with Build Reward Statements.

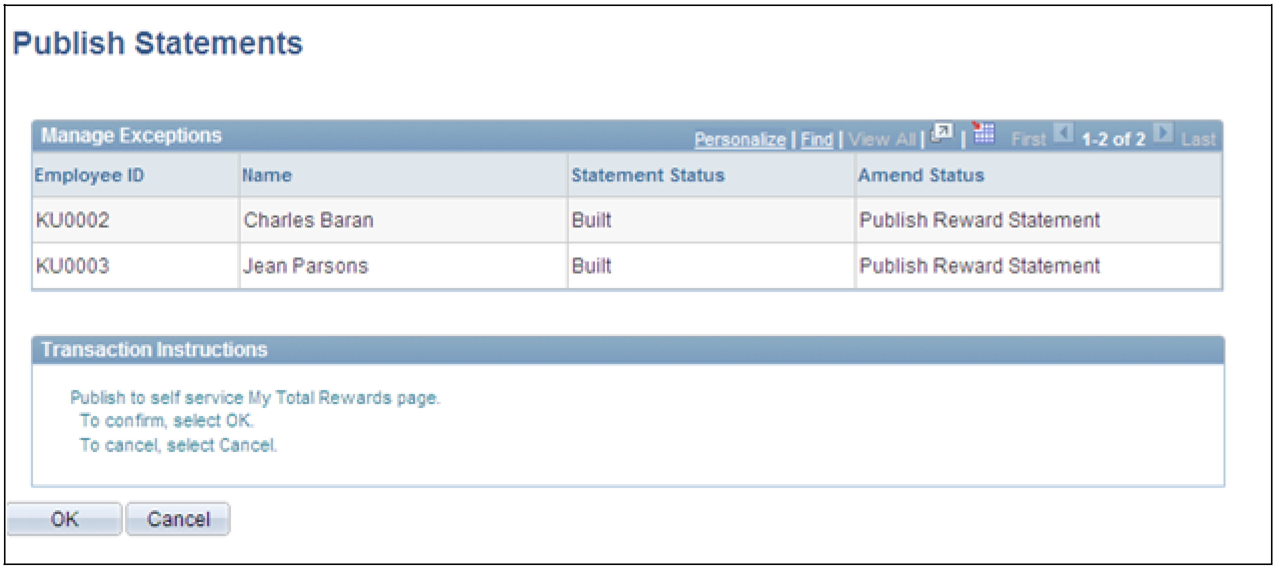
Here is a high level overview of the Reward Extract process:

Step	***Description***
Perform currency conversion	The system: • Displays the Total Reward Statement in the currency specified on the employee's primary HR job record. • Identifies reward items requiring currency conversion, retrieves currency conversion, and updates the Employee Statement Reward Item table (TRW_EE_STMT_ITM). **Note.** If the currency conversion rate cannot be retrieved for the Rate Type and Market Rate Index specified, then the Reward Build process generates an error message.
Inserts Reward Items that are configured to Always Display	The system inserts zero reward item detail for Reward Items that are not extracted, but configured to Always Display.
Populates the Statement Section Summary	The system populates the Employee Statement Section Summary table (TRW_EE_STMT_SEC).
Performs build validations	The system identifies employees who have a missing section. **Note.** Reward items that were not extracted may have a section with zero numeric reward amounts. This can occur if Reward items are configured with the Always Display option.
Updates the Statement Status	If errors occurred, the system: • Sets the Statement Status to Reward Build Error. • Enables the Check Messages link on the Administer Statement page. • Sets the Statement Status to Reward Build Complete, If there are no errors.
Generates a detailed output log file accessible through Process Monitor.	The file name is TRW_RWD_BUILD_INFO.txt.

Note. When processing the Reward Build to amend a specific list of employee's, the steps are basically the same except the statement status assigned. The Statement Status assigned will be *Amend Build Error* or *Amend Build Complete.*

Publishing Statement Summary Information

Access the Publish Statements page (click the Publish icon on the Administer Statement page).



Publish Statements page

Manage Exceptions

Employee ID Displays the ID of the employee who is ready to be published.

Name Displays the name of the employee.

Statement Status Displays the current status of the employee's total reward statement. Amend Status For this page, it should only display those amended employees that are ready to be published.

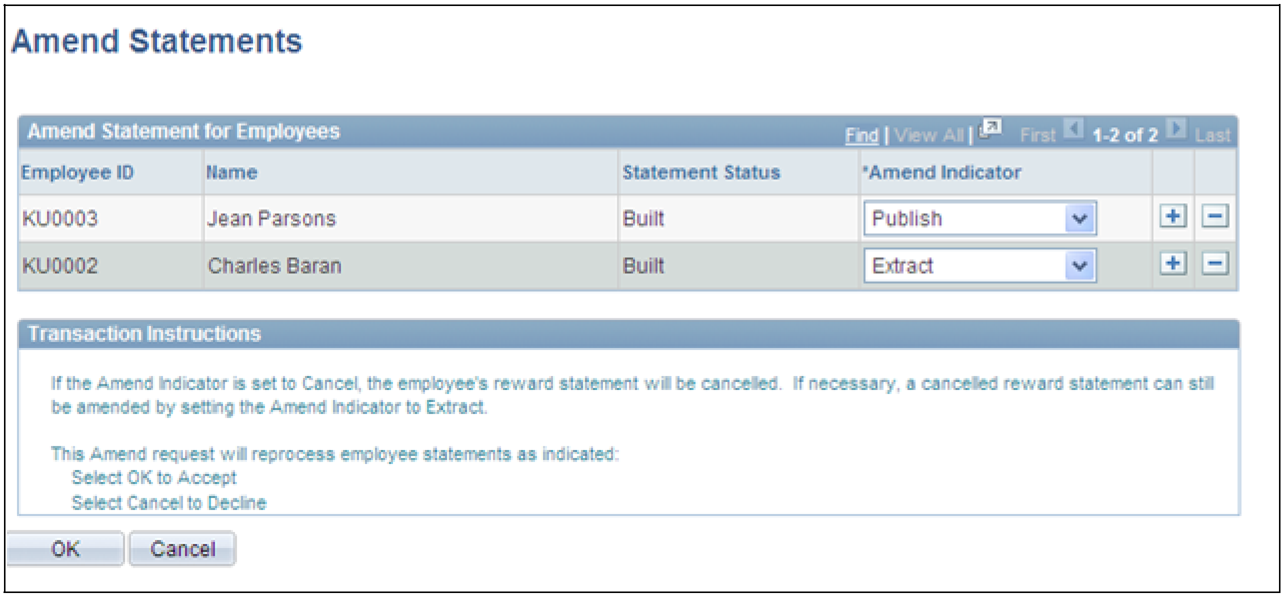
When the compensation administrator clicks OK, all reward statements with reward data are published and available through:

- Employee Self Service, My Total Rewards
- Manager Self Service, View Total Rewards
- Administer My Total Rewards

Reward statements with no rewards data will be placed into a *Publish Error* status, which generates an error message.

Amending Total Reward Statements

Access the Amend Statements page (click the Amend Statement icon on the Administer Statement page when the statement has reached the Published status stage).



Ament Statements page

This page enables the compensation administrator to amend or cancel individual employee total rewards statements.

Amend Statement for Employees

Employee ID

Edit field that allows the Compensation Administrator to select the employee they want to amend.

Name

Displays the name of the Employee.

Statement Status

Displays the current status of the Employee's total reward statement.

Amend Indicator

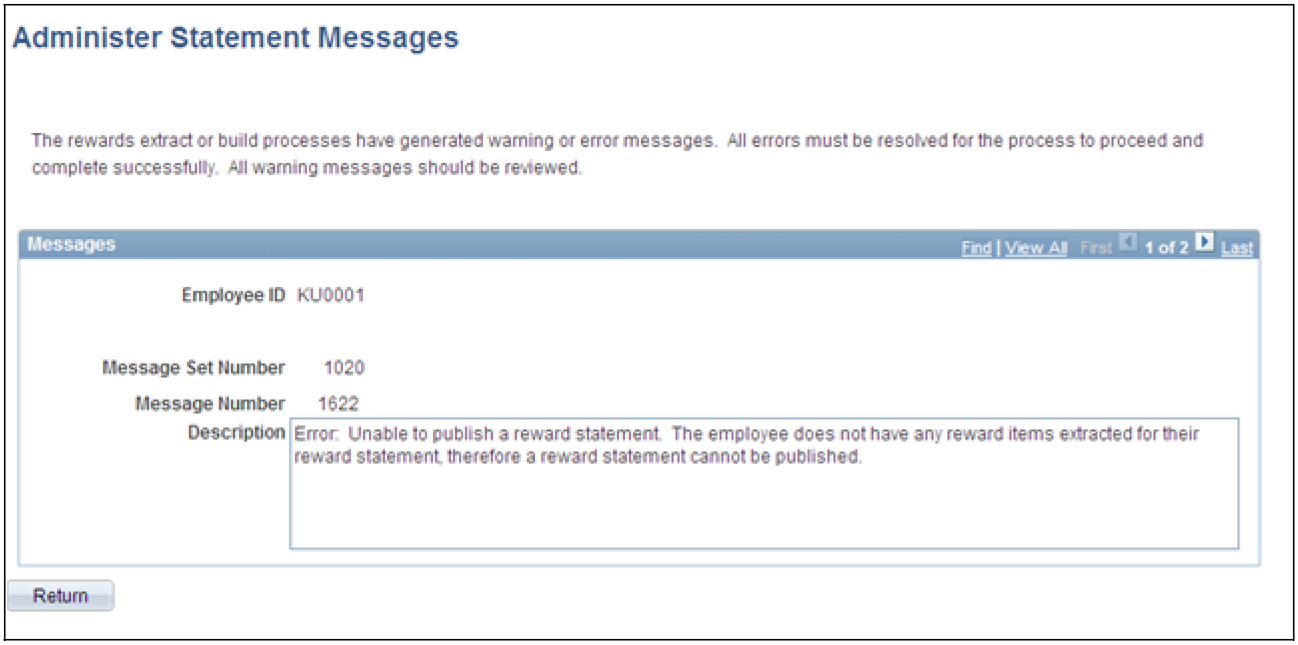
Based on the statement status, this drop down menu displays the valid Amend Indictor that can be selected. For example, if the employee's statement is Built, the Amend Indicator can only be set to Extract, Publish, or Cancel. Listed below are the Amend Indicators:

- Extract
- Build
- Publish
- Cancel

If an employee's statement is set to the Amend Indicator of Cancel, then the total reward statement status will be set to Cancelled and it will no longer be accessible. A cancelled reward statement can be set to the Amend Indicator of Extract to process it and make it accessible again. Note: When a reward statement is being amended, it will not be accessible.

Reviewing Warnings and Error Messages

Access the Administer Statement Messages page (click the Check Messages link on the Administer Statement page).



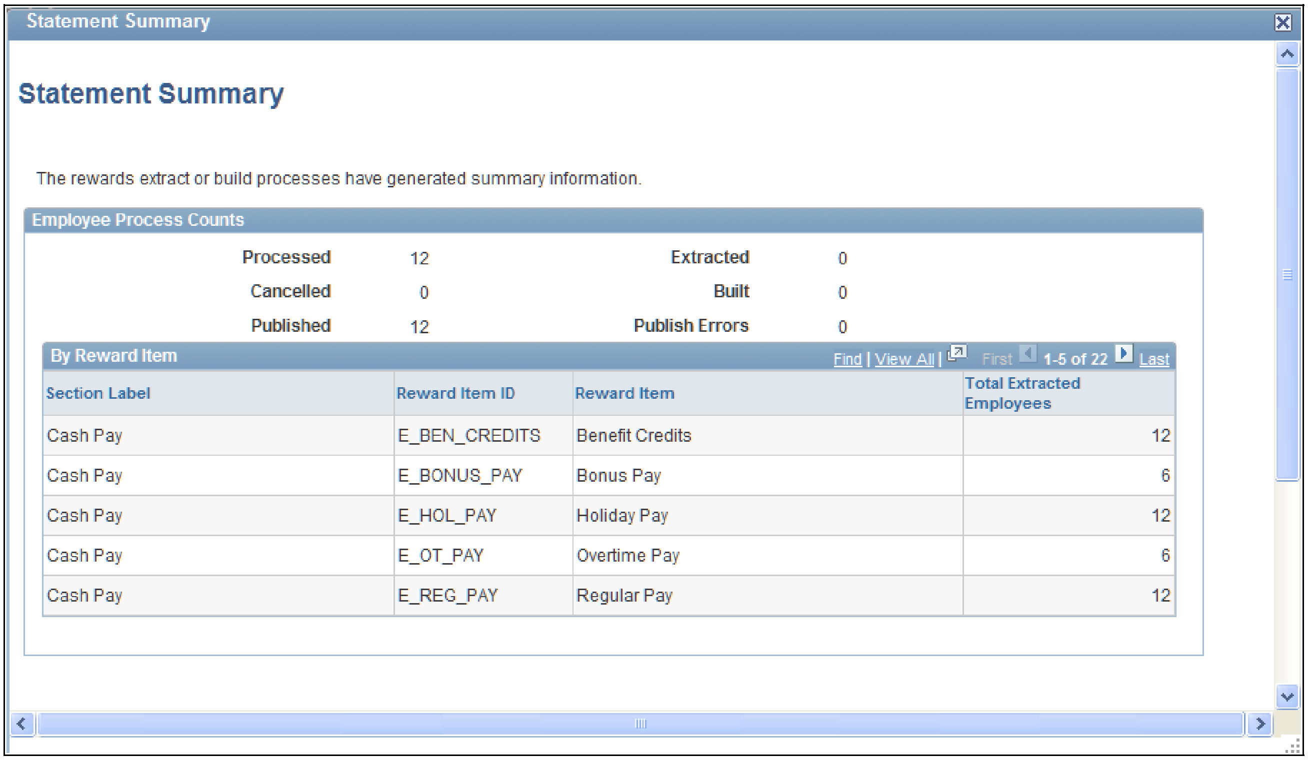
Administer Statement Messages page

Messages

Employee ID	Display-only field that identifies the Employee ID to which the message refers. Note: The employee ID field is hidden if no employee ID is populated.
Message Set Number	Display-only field that displays the Message Set Number of the message.
Message Number	Display-only field that displays the Message Number of the message.
Description	Display-only field that displays the long description of the Message Catalog entry for the Message Set Number and Message Number displayed.

Viewing Statement Summary Information

Access the Statement Summary page (click the View Statement Summary link on the Administer Statement page).



Statement Summary page

Employee Process Counts

Processed

Displays the total number of employees who have a row in the Employee Statement record for the statement ID displayed.

Extracted

Displays the total number of employees who have the reward extract date populated in the Employee Statement record for the statement ID displayed.

Built

Displays the total number of employees who have the statement build date populated in the Employee Statement record for the statement ID displayed

Published

Displays the total number of employees who have the statement published date populated in the Employee Statement record for the statement ID displayed.

Cancelled

Displays the total number of employees who have an employee statement status set to CAN for Canceled for the statement ID displayed.

By Reward Item

Section Label

Description of the section.

Reward Item ID

ID of the reward item.

Reward Item	Description of the reward item.
Total Extracted Employees	Displays the total number of distinct employees who have extracted data for the reward item.

Viewing and Printing the My Total Rewards Statement

This section provides an understanding section and discusses how to:

- View and print the My Total Rewards statement.
- View reward item details.

Understanding the My Total Rewards Page

The My Total Rewards is the communication tool used to inform employees or make them aware of their total rewards. This on-line transaction is a self service application available to every employee with security access. It is similar to viewing payroll information such as pay checks or W-2 documents.

The My Total Rewards application retrieves the employee's information from the login credentials (user ID and password). The layout and content of these pages is defined by the compensation administrator.

When selected, each reward item that is displayed as a link takes the user to a details page that contains further information about the item. The additional information consists of the individual pay items that make up the reward item. The displayed data is configured by the administrator in the Define Reward Data Source and Define Reward Item pages. Typically, the compensation administrator will configure the Holiday Pay reward item in the Cash Rewards grid in the Cash Pay tab.

Employees with Multiple Jobs

The My Total Rewards page is also available for employees with multiple jobs to review their total rewards in a single statement. This on-line transaction functions exactly the same for employees with a single job.

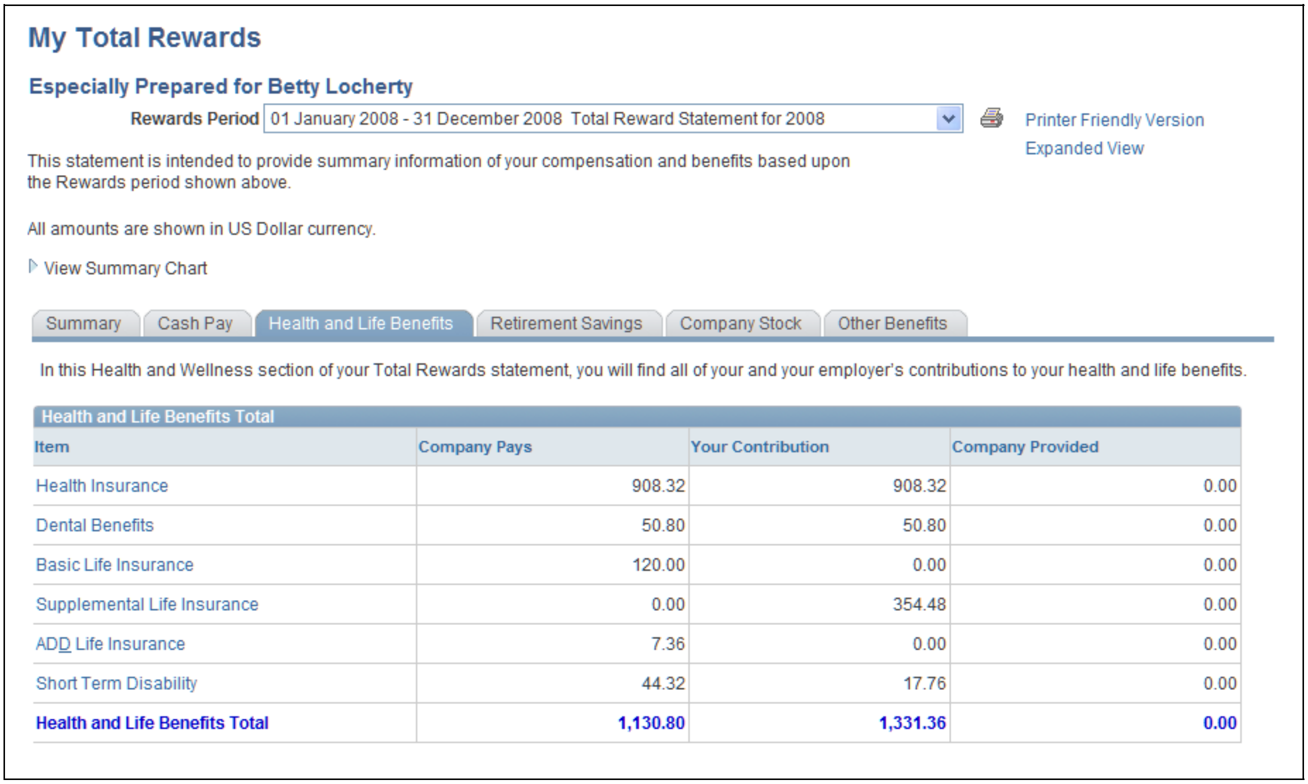
For example, an employee with multiple jobs will see in the Reward Item details of his Total Rewards Statement his or her job titles and the associated reward amounts. All amounts are converted to the employee's current primary job's currency.

Pages Used to View a Total Rewards Statement

Page Name	*Definition Name*	*Navigation*	*Usage*
My Total Rewards	TRW_SS_STMT_TABS	Self Service, Payroll and Compensation, My Total Rewards	Review compensation and benefit summary information for a particular reward period. You can also view a summary chart that shows graphical representation of compensation and benefit summary information.
View Total Rewards	TRW_SS_STMT_TABS	Manager Self Service, Compensation & Stock, View Total Rewards	Review compensation and benefit summary information for a manager's direct report employees for a particular review period. Managers will have access to view all total rewards.
Administer My Total Rewards	TRW_SS_STMT_TABS	Compensation, Total Rewards, Administer My Total Rewards	Review compensation and benefit summary information for the compensation administrator. The compensation administrator will have access to the same view of the employee's total reward statement.
Reward Item Details	TRW_SS_STMT_DETAIL	Click one of the links under the Item column on the My Total Rewards page.	View details for each Reward Item that is displayed as a link. When selected, the system takes the user to a pop-up window that contains further information about the Item. The additional information consists of the individual pay items that roll into the Reward Item. The data displayed here is configured by the administrator in the Define Reward Data Source and Define Reward Item pages.

Viewing and Printing the My Total Rewards Statement

Access the My Total Rewards page (Self Service, Payroll and Compensation, My Total Rewards).



Item	Company Pays	Your Contribution	Company Provided
Health Insurance	908.32	908.32	0.00
Dental Benefits	50.80	50.80	0.00
Basic Life Insurance	120.00	0.00	0.00
Supplemental Life Insurance	0.00	354.48	0.00
ADD Life Insurance	7.36	0.00	0.00
Short Term Disability	44.32	17.76	0.00
Health and Life Benefits Total	**1,130.80**	**1,331.36**	**0.00**

My Total Rewards page

Rewards Period

A date range that represents the time boundaries for the summary amounts that are displayed on the page. You can use this field to toggle between the available total rewards statements. The Rewards Period label is configured by the compensation administrator.

Printer Friendly Version

When you click this link, a long page view replaces the tab view and a new browser page opens.

Expanded View and **Tabbed View**

Use these links to toggle between an expanded long page view and a tabbed view of the page.

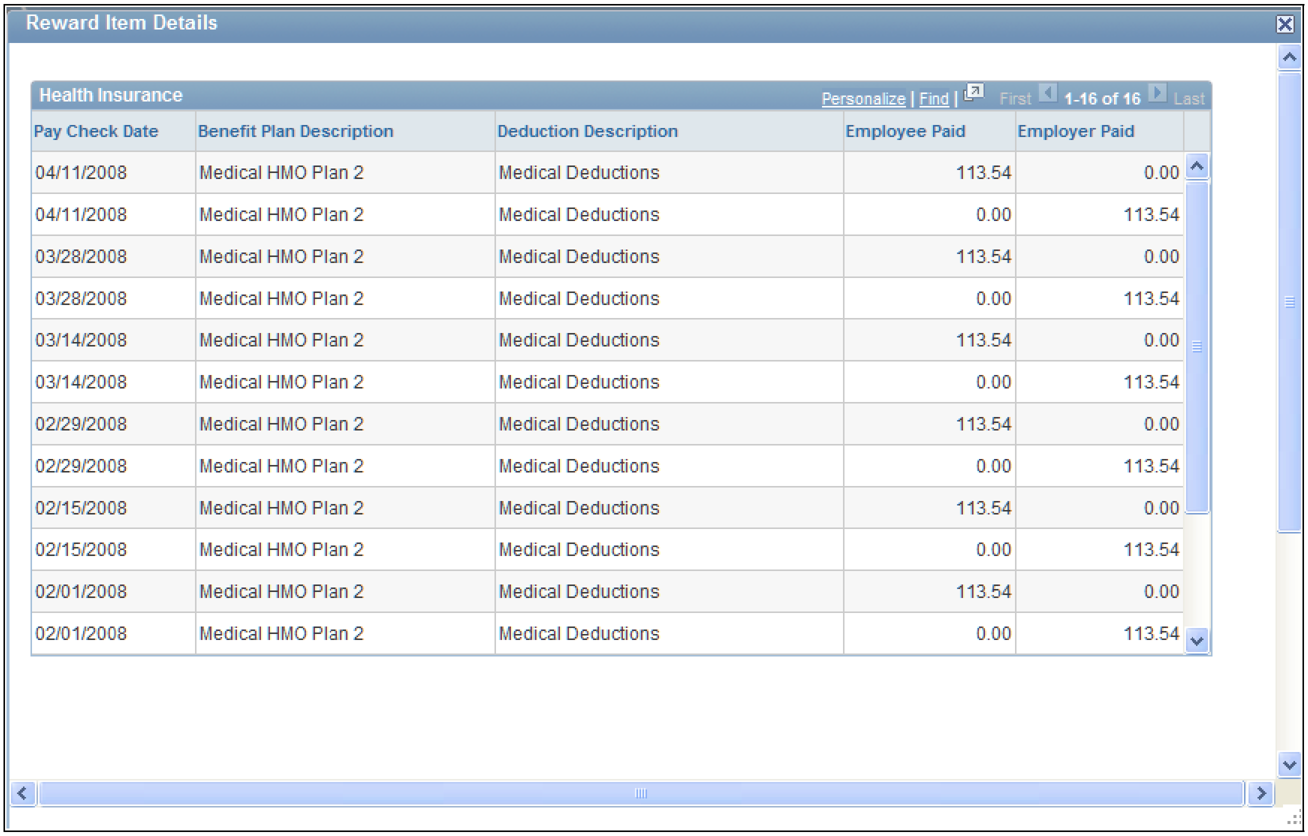
View Summary Chart

A View Summary Chart icon is displayed if a chart was configured in the template. The compensation administrator determines whether or not to display a chart and the chart type.

When you click this link, the system displays a configured chart image. The system displays the tabs and sections depicting the various groupings of rewards available in the total rewards statement. The number of tabs, tab labels, and tab order are all configured by the compensation administrator.

Viewing Reward Item Details

Access the Reward Item Details page (Click one of the links under the Item column on the My Total Rewards page).



Reward Item Details

Health Insurance

Personalize | Find | First 1-16 of 16 Last

Pay Check Date	Benefit Plan Description	Deduction Description	Employee Paid	Employer Paid
04/11/2008	Medical HMO Plan 2	Medical Deductions	113.54	0.00
04/11/2008	Medical HMO Plan 2	Medical Deductions	0.00	113.54
03/28/2008	Medical HMO Plan 2	Medical Deductions	113.54	0.00
03/28/2008	Medical HMO Plan 2	Medical Deductions	0.00	113.54
03/14/2008	Medical HMO Plan 2	Medical Deductions	113.54	0.00
03/14/2008	Medical HMO Plan 2	Medical Deductions	0.00	113.54
02/29/2008	Medical HMO Plan 2	Medical Deductions	113.54	0.00
02/29/2008	Medical HMO Plan 2	Medical Deductions	0.00	113.54
02/15/2008	Medical HMO Plan 2	Medical Deductions	113.54	0.00
02/15/2008	Medical HMO Plan 2	Medical Deductions	0.00	113.54
02/01/2008	Medical HMO Plan 2	Medical Deductions	113.54	0.00
02/01/2008	Medical HMO Plan 2	Medical Deductions	0.00	113.54

Reward Item Details page

The system displays this particular window if you click the Health Insurance link that appears under the Health and Life Benefits tab on the My Total Rewards page.

Note. When the rewards statements are processed, all amounts are converted to the primary Job record's currency so that the amounts may be summed up for each section as well as for the statement's summary.

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