

PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook:
Manage French Profit Sharing

December 2002

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Human Resources PeopleBook:
Manage French Profit Sharing
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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document 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. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources PeopleBook: Manage French Profit Sharing Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.
- Common elements used 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 Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Manage French Profit Sharing* provides you with implementation and processing information for your PeopleSoft Human Resources system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS applications you are implementing, you should be 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 Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other applications. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding...	This is an introductory chapter that broadly explains the product and the functionality within the application.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started With PeopleSoft Human Resources: Manage French Profit Sharing

This chapter provides an overview of PeopleSoft Human Resources: Manage French Profit Sharing business processes and discusses implementation tasks.

Manage French Profit Sharing Business Processes

PeopleSoft Human Resource: Manage French Profit Sharing supports the following business processes:

- Agreement and reference period definition.
- Eligibility processing.
- Calculating profit sharing.
- Interest and payment processing.
- Administering profit sharing.
- Profit sharing for employees.

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

PeopleSoft Human Resources: Manage French Profit Sharing Implementation

The PeopleSoft Human Resources: Manage French Profit Sharing table-loading implementation includes setting up the following:

- HRMS fundamental tables, common to multiple PeopleSoft HRMS applications.
- Profit Sharing tables.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences.

Note. The order in which you set up tables required to implement PeopleSoft Human Resources: Manage French Profit Sharing may vary; each individual application isn't necessarily set up in sequence. For example, you may set up HRMS tables, then tables for Manage French Profit Sharing, then several country-specific tables, followed by additional Manage French Profit Sharing core tables. In addition, the order in which you set up tables may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft Human Resources: Manage French Profit Sharing requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the PeopleSoft Human Resources: Manage French Profit Sharing setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , "Getting Started With PeopleSoft HRMS"

Setting Up PeopleSoft Human Resources: Manage French Profit Sharing Tables

The steps discussed in this section suggest an order in which you define the information in your profit sharing tables. The information that you defined in your global tables has laid the foundation for this setup.

Step	Reference
1. Set up your profit sharing calculation. To do this you need to define variables and formulas.	Chapter 3, "Setting Up Profit Sharing," Setting Up Formulas, page 10
2. (Optional). If an agreement applies to multiple companies and establishments, set up agreement groups to define the organizations that share agreements.	Chapter 3, "Setting Up Profit Sharing," Defining Agreement Groups, page 16
3. (Optional). Define work units for worker's participation agreements. If your global fund calculations vary according to work units, use group build to define the work units.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , "Setting Up Groups"
4. Set up your agreements. This includes defining eligibility criteria, profit sharing calculation, distribution and investment method.	Chapter 3, "Setting Up Profit Sharing," Setting Up Agreements, page 17
5. Set up the reference periods for your agreements.	Chapter 3, "Setting Up Profit Sharing," Setting Up Reference Periods, page 28
6. Define your payroll information. The profit-sharing calculations depend on payroll information imported either from PeopleSoft Global Payroll for France or an external record populated with payroll data.	Chapter 3, "Setting Up Profit Sharing," Defining Payroll Mapping, page 33

Step	Reference
7. Set up workflow for profit sharing. PeopleSoft deliver workflow for the Manage French Profit Sharing business process that triggers email notifications to employees and compensation administrators.	<u>Chapter 3, “Setting Up Profit Sharing,” Setting Up Workflow for Profit Sharing, page 34</u>

CHAPTER 2

Understanding PeopleSoft Human Resources: Manage French Profit Sharing

This chapter provides an overview of the Manage French Profit Sharing business process and discusses:

- PeopleSoft Human Resources: Manage French Profit Sharing business processes.
- PeopleSoft Human Resources: Manage French Profit Sharing integrations.
- Profit sharing terms.

PeopleSoft Human Resources: Manage French Profit Sharing

The Manage French Profit Sharing business process is for French customers who need to manage their profit-sharing and worker's participation agreements. Here is a summary of the features of this business process:

- Ability to define agreements and link the agreement document, giving online access to agreement definitions.
- Automatic calculation of global funds and each employee's personal fund.
- Compensation administrators can review and adjust the results of the calculation at every stage and approve fund release and track fund transfer.
- Online access for employees to view agreement and fund information. Employees can also update their investment settings and request release of funds.
- Integrating PeopleSoft Human Resources with Global Payroll for France enables you to automatically process payments for profit-sharing and worker's participation funds.
- Enterprise Integration Points (EIPs) enable you to integrate other payroll systems to Manage French Profit Sharing.
- Workflow provides automatic notification of profit sharing events for employees and compensation administrators.
- Reports provide details of employees' profit-sharing funds.

PeopleSoft Human Resources: Manage French Profit Sharing Business Processes

Manage French Profit Sharing supports the following business processes:

- Agreement definition

PeopleSoft's profit sharing supports two types of agreements, profit-sharing agreements and worker's participation agreements. You define all the rules relating to the agreement, including eligibility criteria, calculations for computing the global fund and sharing it between employees, and the investment methods available. Calculations are based on company results and payroll information over a period known as a reference period. You create one or more reference periods for each agreement, depending on the duration of the agreement.

- Eligibility processing

The Extract Eligible Employees process identifies the employees who qualify for profit sharing under the terms of an agreement and imports payroll information for all eligible employees from PeopleSoft Global Payroll for France, or from a record that you have populated from another payroll system.

- Calculating and distributing profit sharing

PeopleSoft provide two processes, Compute Global Funds process and Distribute Global Funds, that calculate the global funds and each employees' personal entitlement. These processes calculate the global funds available using formulas defined in the agreement, and divide funds according to the distribution rules in the agreement. PeopleSoft deliver legal formulas for calculating funds, where these are defined by French legislation.

- Payment and Interest processing

Earnings from profit sharing are liable for deductions. The Payment and Interest process automatically calculates employees' deductions. For those employees who are receive interest on profit sharing funds, the system also calculates the interest amount and the deductions for the interest payment. If you have integrated PeopleSoft Human Resources with Global Payroll for France or another payroll system, you can process employee payments for worker's participation agreements and profit-sharing agreements where the investment is managed internally.

- Administering and reporting profit sharing

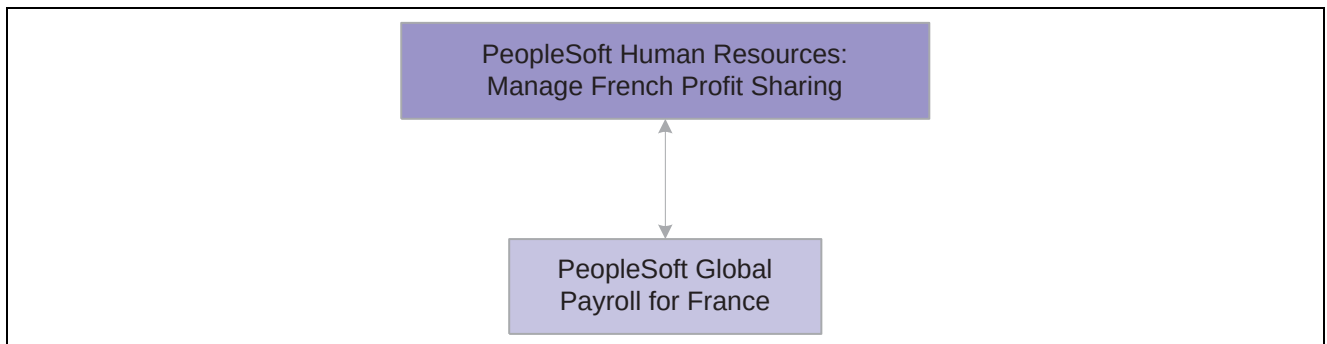
The Manage French Profit Sharing business process provides administration options for reviewing employees' profit sharing details, and adjusting the results of the automated processes, if required. Compensation administrators approve employee requests for fund release and can track fund transfers using the Member Entitlement component.

- Profit sharing for employees

Employees have access to their profit sharing information online using PeopleSoft Human Resources. The Manage French Profit Sharing business process provides employee options for viewing details of approved agreements and personalizing agreement settings, and viewing personal entitlements. In addition, employees who are entitled to funds from a profit-sharing agreement can submit requests for fund releases.

PeopleSoft Human Resources: Manage French Profit Sharing Integrations

The Manage French Profit Sharing business process integrates with the following PeopleSoft applications:



PeopleSoft Human Resources: Manage French Profit Sharing integration flow with other PeopleSoft applications

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Enterprise Integration Points in HRMS”

Profit Sharing Terms

This section explains the terms used in this PeopleBook.

Profit Sharing Terms Used in This PeopleBook

Agreement (<i>accord</i>)	Defines the terms of the profit-sharing or worker’s participation scheme. Several organizations, including staff representative bodies, are involved in approving agreements. Employees can view agreement definitions once an agreement is approved by the all the relevant organizations.
Agreement group	Defines the companies and establishments that share the same agreement.
Profit-sharing agreement (<i>accord de participation aux résultats</i>)	A type of agreement. The global fund for this type of agreement is dependent on company profits.
Worker’s participation agreement (<i>accord d’intéressement des salariés</i>)	A type of agreement. The global fund for this type of agreement is dependent on achieving objectives that are defined in the agreement.
Global fund (<i>réserve</i>)	The amount that is shared between eligible employees. The global fund is calculated after the end of the reference period.
Distribution method (<i>mode de répartition</i>)	Defines how the global fund is shared between employees. The Profit Sharing business process supports these distribution methods: • Uniform distribution divides the fund equally between eligible employees. • Prorate with salary is based on employees’ salaries. • Prorate with working duration is based on the number of days that the employee worked in the reference period. • Any combination of the above distribution methods.

Investment method
(méthode d'investissement)

Defines how the global fund is invested. Investment methods vary according to the agreement type. Each agreement definition includes one or more investment methods. Employees can accept the default investment method defined for the agreement or select from the specified methods.

Reference period ***(période de référence)***

Defines the period that the profit sharing calculations are based on. An agreement is valid for one or more reference periods. The profit sharing processes use company and establishment financial data and employee payroll data for a reference period to:

- Determine which employees are eligible for a share of the global fund.
- Calculate the global fund.
- Calculate employees' profit-sharing amount.

Unavailability period
(période d'indisponibilité)

The period during which global funds are not available to employees. Profit-sharing agreements have a fixed period at the end of the reference period when employees cannot access, except in certain situations, their share of the global fund. Worker's participation agreements don't have an unavailability period; funds are available as soon as the compensation administrator runs the profit sharing processes and approves the results.

CHAPTER 3

Setting Up Profit Sharing

This chapter gives an overview of profit-sharing agreements and explains how to:

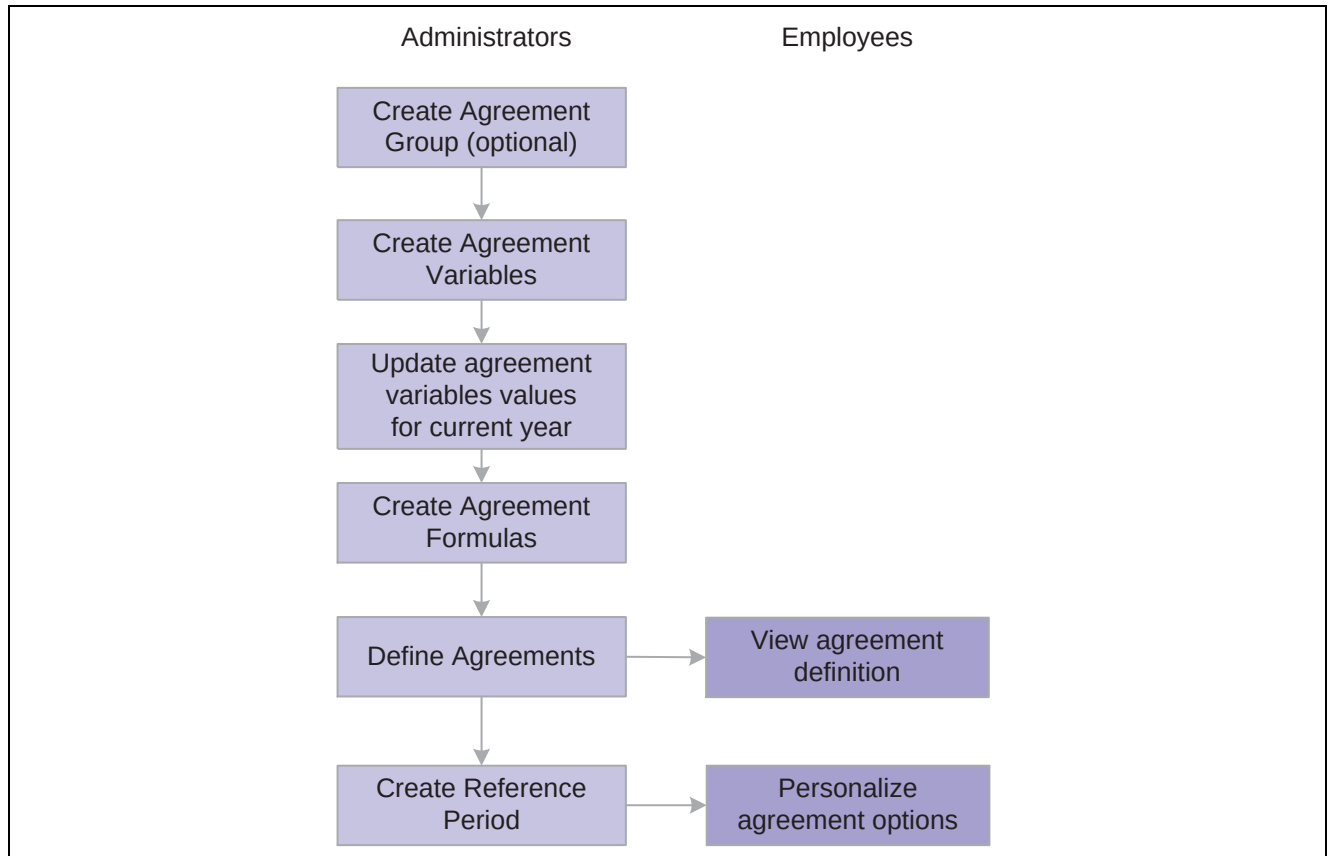
- Set up variables and formulas.
- Define agreement groups.
- Set up agreements.
- Define reference periods.
- Setting up workflow for profit sharing.

Understanding Agreements

The first step in the profit-sharing business process is to define your organization's agreements. You can manage two types of agreement, each with different rules:

- Worker's participation agreements (*intéressement des salariées*)
- Profit-sharing agreements (*participation aux résultats*)

You create both agreement types using the same Define Agreement component. The steps for creating an agreement are as follows:



Process for Setting Up Agreements

Each step is covered in detail in this chapter.

Setting Up Formulas

This section gives an overview of formulas required for profit sharing and discusses how to:

- Define variables for formulas.
- Set up formulas.

Understanding Formulas

Profit sharing processes use formulas that you specify in the agreement to calculate the global fund amount and employees' individual funds. To offer flexibility in defining calculations, formulas vary from simple formulas in which you assign a variable to the formula to more complex situations in which you take values from fields in the database to use in the calculation.

When you create an agreement, you define formulas that calculate the following values:

- Global fund

PeopleSoft provides the legal formula for profit sharing agreement types; worker's participation agreements don't have a legal formula.

- Global fund limit

This is an optional formula that defines the maximum or minimum global fund amount. PeopleSoft delivers formulas to calculate this amount for profit-sharing and worker's participation agreements.

- Individual salary limit

This optional formula is used in the distribution calculation where the global fund amount is shared according to employees' salaries. The formula defines the maximum salary amount used in this calculation.

- Individual allocation limit

This optional formula defines the maximum amount received by any employee.

If a formula references variables with a type of *Monetary*, the formula is assigned the same currency code. However, when the system resolves a formula, all amounts are converted to the currency specified in the agreement definition. All profit-sharing pages and reports use this currency.

Understanding Variables

Variables store monetary and other numeric values that are used in the profit-sharing formulas. Use variables to:

- Provide one of the values used in a formula.
- Assign a value to the formula directly.

For some agreements, a formula may be calculated outside the system and the final result entered into the system. To do this, define the variable and assign it to the relevant formula. For each reference period, update the variable with the calculated value before running the calculation processes.

You must define variables, using the Variable page, before you can use them in formulas.

Note. You must assign values to variables before you run the processes for a new reference period.

Pages Used to Set Up Variables and Formulas

Page Name	Object Name	Navigation	Usage
Variable	WP_VARIABLE_TBL	Set Up HRMS, Product Related, Compensation, Profit Sharing FRA, Agreement Variables, Variable	Define variables for use in the profit-sharing formulas.
Formula	WP_FORMULA_TBL	Set Up HRMS, Product Related, Compensation, Profit Sharing FRA, Agreement Formulas, Formula	Define formulas for profit-sharing calculations.
Formula View	WP_FORMULA_VW_SEC	Click the View Formula link on the Formula page.	View a plain text version of the formula.
Formula Comments	WP_FORMULA_CMT_SEC	Click the Comments link on the Formula page.	Enter comments about the selected formula.

Defining Variables for Profit-Sharing Formulas

Access the Variable page.

Variable

Variable ID:

KFSSLIMIT

*Long Description:

Social Security contribution limit (annual)

Short Description:

SSLimit

Variable Values

Customize | Find | View All |

First 1 of 1 Last

*Value Scope	*Effective Date	*Status	*Type	Monetary Value	Prorate
Global	01/01/2002	Active	Monetary	28,224.00	EUR

Variable page

Variable ID

Identifies the variable. PeopleSoft delivers the following variables that are used in the statutory formulas:

KFBC: Account Net Income (*bénéfice net comptable*)

KBBF: Fiscal Net Income (*bénéfice net fiscal*). Refer to French legal report 2058-A line XN.

KFC: Capital (*C — capitaux propres*) as defined by French labor laws (*code du travail*).

KFCAN: Revenue for current reference period. This is optional and is used for profit-sharing agreements only.

KFCAN-1: Revenue for the previous reference period. This is optional and is used for profit-sharing agreements only.

KFCRDS: Rate for CRDS contributions. PeopleSoft delivers the values for this variable as system data.

KFCSG: Rate for CSG contributions. PeopleSoft delivers the values for this variable as system data.

KFIMMED: Limit for immediate payment of funds. This is for profit-sharing agreements only. When an employee's profit-sharing amount is below this limit, the employee is entitled to receive the amount immediately. PeopleSoft delivers the values for this variable as system data.

KFMS: Total Payroll (*masse salariale*). This variable is used for worker's participation agreements only. It is used by the formula KF20PCTMS to determine whether the global fund is more than 20% of the total salaries. The Distribute Global Fund process also uses the variable to determine the total salary to use for distributing funds based on salary.

Note. If you want the global fund limit formula (KF20PCTMS) and the Distribute Global Fund process to be based on different totals, define the *KFMS* variable for the process and create a new global fund limit formula for your worker's participation agreement which doesn't reference the *KFMS* variable.

KFS: Total of salaries used in the legal profit sharing global fund formula.

Value Scope and Scope Reference

KFSOC: Social Contribution of 2% paid on interest payments. PeopleSoft delivers the values for this variable as system data.

KFSSLIMIT: Social Security contribution limit used in limit formulas such as the Individual Allocation Limit formula. PeopleSoft delivers the values for this variable as system data.

KFVA: Added Value (*VA- valeur ajoutée*) as defined by French labor laws.

Defines the scope of the variable. You can define a variable with more than one scope if you want to use the same variable name but assign it different values depending on the scope. Select from the following values:

Global: The variable applies to all employees and all agreements. An example of a global variable is the Social Security contribution limit variable, which varies over time but is the same for all employees. The Scope Reference field is not displayed for global variables.

Company: The variable applies to a specific company. For example, the value of the Net Income variable is different for each company. Select the company in the Scope Reference field.

Agreement Group: The variable applies to all companies or establishments within an agreement group. Select the agreement group in the Scope Reference field.

Establishment: The variable applies to an establishment that you select in the Scope Reference field.

Work Unit: The variable applies to a work unit that you select in the Scope Reference field. Work units are created using the group build feature.

When the system processes a formula, it looks for the variable that is appropriate for the agreement. It's important that you define the scope correctly. Otherwise, the system may not find the variable or may retrieve the wrong value.

For example, if you set up a profit-sharing agreement for an agreement group, the system searches for a variable with a scope of *Agreement Group* and if it doesn't find one, it looks for a variable with a scope of *Global*. If you define the variable scope as *Company*, the system does not find the variable.

For worker's participation agreements you can define calculations at the agreement level, establishment level, or work unit level. For such formulas, the system searches for a variable defined for that establishment or work unit, and if it doesn't find one, it looks for a global variable of the same name.

See [Chapter 3, "Setting Up Profit Sharing," Defining the Agreement Calculation, page 20.](#)

Type

Select *Monetary* or *Numeric*. If you select *Monetary*, select the corresponding Currency.

Prorate

Select if the variable is prorated for reference periods of less than a year. For example, if a variable stores an annual limit, but you

have set up a reference period of 3 months, select this check box to use a prorated value in the calculations.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Groups”

Chapter 4, “Running the Profit Sharing Processes,” Understanding the Distribute Global Funds Process, page 41

Setting Up Formulas

Access the Formula page.

Formula

Formula ID: LEGAL_RSP

Formula Criteria Find | View All First 1 of 1 Last

*Effective Date: 01/01/1990 *Status: Active

*Long Description: Legal Funding Formula

Short Description: Legal Fund [View Formula](#) [Comments](#)

Formula Details Customize | Find | View All First 1-7 of 17 Last

Sequence	*Operand	Variable	Value/Record		
1	Constant		0.500000	+	-
2	*			+	-
3	(			+	-
4	Variable	KFBF		+	-
5	-			+	-
6	(			+	-
7	Constant		5.000000	+	-

Formula page

Formula ID

Identifies the formula. PeopleSoft delivers statutory formulas for the profit-sharing business process, and technical formulas that are called by the processes. Here is a list of the statutory formulas:

LEGAL_RSP: Legal funding formula that calculates the global fund for profit-sharing agreements.

LEGAL_MAX1, *LEGAL_MAX2*, *LEGAL_MAX3*, and *LEGAL_MAX4*: Global fund limit formulas for profit-sharing agreements.

KF20PCTMS: Global fund limit formula for worker's participation agreements. This formula uses the KFMS variable to check that the global fund is not more than 20% of total payroll.

1/2SSLIMIT: Individual allocation fund formula that is equivalent to half the annual social security ceiling.

3/4SSLIMIT: Individual allocation fund formula that is equivalent to three quarters of the annual social security ceiling.

4SSLIMIT: Individual salary limit formula that is equivalent to four times the annual social security ceiling.

Note. Other formulas delivered by PeopleSoft are technical and called from the profit sharing processes.

Operand

Select an operand and click the Refresh button. The Operand that you select determines the other fields that are hidden or displayed on the page. Values include:

Constant: Represents a fixed value. Enter a percentage or other fixed amount in the Value/Record field.

Rate Code: Refers to a Rate Code that you specify from the Rate Code table. Select a rate code in the Rate Code field.

Rec. Field (Record, Field Name): Refers to a field you specify from a record. Select the record and field in the Record, Field Name field. You can select from the following records: *EMPLOYMENT*, *JOB*, *PERS_DATA_EFFDT*, or *SAL_GRADE_TBL*.

Variable: Refers to a variable that you specify. In the Variable field, select from the variables that you defined on the Variable page. For some agreements, a formula may be calculated outside the system and the final result entered into the system. To do this, define the variable and assign it to the relevant formula.

View Formula

Click to view a plain text version of the formula.

Comments

Click to access the Formula Comments page where you can enter comments about the formula. When employees view the global fund formula the system displays the text you enter on the Formula Comments page. Therefore you should enter comments that help employees understand the global fund calculation. See the comments delivered with the *LEGAL_RSP* formula for an example of how to use the Formula Comments page.

Save

Click to save the formula. The system checks the syntax and displays an error message if there are missing fields or brackets.

Defining Agreement Groups

Agreements can apply to a single company or a group of companies and establishments.
This section discusses how to define agreement groups.

Pages Used to Define Agreement Groups

Page Name	Object Name	Navigation	Usage
Agreement Group	WP_AGRT_GRP_TBL	Set Up HRMS, Product Related, Compensation, Profit Sharing FRA, Agreement Group, Agreement Group	Define agreement groups, the companies and establishments that share the same profit-sharing agreement.

Defining Agreement Groups

Access the Agreement Group page.

Agreement Group

Agreement Group ID: KFG001

***Long Description:** Group for Establishment KF001

Short Description: KFG001

Include Company [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

*Company			
KF1		Business Institute - France	

Include Establishment [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

*Establishment ID			
KF001		Paris - Headquarter	

Exclude Establishment [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

*Establishment ID			
KF002		Bordeaux - Le Barville	

Agreement Group page

Include Company

Company

Select the companies that belong to the agreement group.

Include Establishment

Establishment ID Select establishments to include in the agreement group. Use this field to select individual establishments associated with companies that not listed in the Include Company group box.

Exclude Establishment

Establishment ID If the agreement group doesn't include all the establishments in the selected companies, select the establishments to exclude from the group.

Setting Up Agreements

This section discusses how to:

- Define agreements.
- Define the agreement calculations.
- Define investment methods.
- Define company investment details.
- Define company savings account details.
- Define company stock details.

Prerequisites

Before you can set up agreements you must define the following:

- Variables and formulas for global fund calculations.
- (Optional) Agreement groups if your agreement is for a group of companies or establishments.

See Also

Chapter 3, "Setting Up Profit Sharing," Setting Up Formulas, page 10

Chapter 3, "Setting Up Profit Sharing," Defining Agreement Groups, page 16

Common Elements Used in This Section

SICOVAM Enter the number for the FCP or SICAV investments.

Financial Organization Enter the name of the company that manages the investment of the global funds.
Enter the company's address in the Financial Organization Address field.

Pages Used to Set Up Agreements

Page Name	Object Name	Navigation	Usage
Agreement	WP_AGREEMENT_TBL	- Set Up HRMS, Product Related, Compensation, Profit Sharing FRA, Define Agreement, Agreement - Compensation, Profit-Sharing FRA, Review Agreement, Agreement	Define basic details of the agreement, such as agreement type, status, scope, and agreement duration. You can also attach the agreement document to the agreement from this page.
Computation	WP_AGRT_COMP_TBL	- Set Up HRMS, Product Related, Compensation, Profit Sharing FRA, Define Agreement, Computation - Compensation, Profit-Sharing FRA, Review Agreement, Computation	Define how the global fund is calculated and distributed to employees at the end of a reference period.
Investment	WP_AGRT_INVEST_TBL	- Set Up HRMS, Product Related, Compensation, Profit Sharing FRA, Define Agreement, Investment - Compensation, Profit-Sharing FRA, Review Agreement, Investment	Define the investment methods for the agreement.
Company Investment	WP_AGRT_INVES3_SEC	Click Details on the Investment page with Company Investment selected as the investment method.	Enter the name and address of the financial organization that manages the investment.
Bond, FCP, or SICAV	WP_AGRT_INVES2_SEC	Click Details on the Investment page with Bond, FCP, or SICAV is selected as the investment method.	Specify the SICOVAM number for the investment and the financial organization that manages the global fund.
Company Saving Account	WP_AGRT_INVES4_SEC	Click Details on the Investment page with Company Savings Account selected as the investment method.	Enter the interest rate paid on the company savings account.
Company Stock	WP_AGRT_INVES1_SEC	Click Details on the Investment page with Company Stock selected as the investment method.	Enter details of the company stock ticker symbol

Defining Agreements

Access the Agreement page.

Agreement		Computation	Investment
Agreement ID:	KF1		
*Long Description:	Profit Sharing Agreement for Company KF1		
Short Description:	KF1		
*Agreement Type:	Profit Sharing		
*Agreement Status:	Approved	Approval Date:	01/07/2002
*Agreement Start Date:	01/01/2000		
Unavailability Duration:	5 Years		
*Currency Code:	EUR euro		
Agreement Duration ☒ Undetermined ☐ Determined		Agreement Scope ☒ Company KF1 Business Institute - France ☐ Agreement Group	
Attach Agreement Document			

Agreement page

Agreement Type

Select *Profit Sharing* or *Worker's Participation*. The system hides or displays fields depending on the agreement type you select.

Agreement Status

Select a status. Values are:

Construction in Progress: Denotes an agreement that is under discussion and not yet agreed. Employees can't view details of agreements with this status.

Approved: Denotes an agreement that has been signed by all relevant organizations. Employees can view and adjust details of agreements with an *Approved* status.

On Hold: Denotes an agreement that has been started but is not in use. Use this status if, for example, an agreement is rejected by an organization that is involved in the discussion process. Employees can't view details of agreements with this status.

Approval Date

Enter the date when the agreement was signed. Normally, agreement approved within one year of the reference period end date. If this date is passed, legal requirements can affect the definition of some fields in the agreement. The system checks the Approval Date and issues a warning message if it is more than a year after the reference period end date. However, the system does not change the agreement definition. Update the agreement, if necessary, to meet the legal requirements.

This field appears only if you select *Approved* in the Agreement Status field.

Unavailability Duration

Enter the number of days, months, or years after the reference period end date that profit sharing funds are unavailable to employees. This field determines the availability and payment date for funds.

	This field appears only if you select <i>Profit Sharing</i> in the Agreement Type field.
Agreement Start Date	Enter the date when the agreement is effective.
Agreement End Date	Enter the date on which the agreement expires.
	This field appears only if you select <i>Determined</i> in Agreement Duration.
Attach Agreement Document	Click to attach the agreement document to the agreement. The system displays a search page on which you enter the document path and file name or browse for the document.
	When the agreement is approved, employees can view the attachment online.

Agreement Duration

Complete this group box for profit-sharing agreements only. For worker's participation agreements the duration is set to Determined by the system and can't be changed.

Undetermined	Select if the agreement duration is not fixed.
Determined	Select if the agreement is valid for a fixed period.

Agreement Scope

Company	Select if the agreement applies to a single company. Select the company name from the available options.
Agreement Group	Select if the agreement applies to a group of companies or establishments and select the Agreement Group.
	Define agreement groups before you set up the agreement.

See Also

Chapter 3, "Setting Up Profit Sharing," Defining Agreement Groups, page 16

Defining the Agreement Calculation

Access the Computation page.

Computation page

Eligibility Criteria

Seniority

Select this check box if employee eligibility is determined by length of service.

If the check box is not selected, anyone employed by the companies and establishments defined on the Agreement page is eligible for profit sharing.

Seniority Eligibility Duration

Enter the minimum period that employees must be employed by the organization before they are eligible to share in the funding available.

This field is available if you select the Seniority check box.

Profit-Sharing Calculation

Use this group box to define the formulas that are used to calculate the funding and distribution for the agreement. Define formulas on the Formula page.

Computation Level

For profit-sharing agreements *Computation Level* doesn't appear because formulas and distribution methods are always defined at the agreement level.

Select a value for worker's participation agreements. Values are:

Agreement Level: Indicates that the formulas and distribution method apply to all establishments and employees covered by the agreement. The Agreement Scope group box on the Agreement page defines the companies and establishments covered by the agreement. You must define formulas at the Agreement Level in addition to any establishment or work unit level calculations. This provides default formulas for employees who don't belong to any establishments or work units specified in this group box.

Establishment Level: Enables you to define different formulas and distribution methods for each establishment. Formulas defined at this level apply to employees within the establishment only. Select the establishment from the available options.

Work Unit Level: Enables you to define different formulas and distribution methods for groups of employees. Formulas defined at

this level apply to employees within the work unit only. Use the group build functionality to define work units.

Funding Formula

Select the formula that calculates the global fund amount. The legal formula delivered by PeopleSoft, *LEGAL_RSP*, is for profit-sharing agreements.

Note. For profit-sharing agreements if you don't use the *LEGAL_RSP* formula, make sure that your organization's formula does not produce a result that is less than that of the legal formula.

Global Fund Limit Formula

Select the formula that defines the global fund limit. The Compute Global Fund process uses this formula to limit the global fund amount. PeopleSoft delivers the following statutory formulas:

LEGAL_MAX1, *LEGAL_MAX2*, *LEGAL_MAX3*, and *LEGAL_MAX4*: These formulas may be useful for profit-sharing agreements, if you haven't selected the legal formula *LEGAL_RSP* in the Funding Formula field. If the global fund calculated using the Funding Formula exceeds the maximum defined by the Global Fund Limit Formula, the process reduces the global fund to the maximum.

KF20PCTMS: This formula may be used for worker's participation agreements.

Individ. Salary Limit Formula (individual salary limit formula)

Select the formula that defines the maximum salary amount used in the distribution calculation. Some distribution calculations use an employees' salaries to determine their share of the funding. Use this field to force a limit on the salary amount used in the calculation.

Select the Prorate check box if you want to prorate the limit for employees who did not work for the whole reference period. For example, if the limit is 20,000 euros and an employee worked only half of the reference period, if you select Prorate, the limit applied to the employee's salary is 10,000 euros.

Individual Alloc Limit Formula (individual allocation limit formula)

Select the formula that defines the maximum amount that each employee receives from profit sharing. For example, if the system calculates that an employee's allocation is 2000 euros, but this formula sets the limit to 1500 euros, then the employee will receive 1500 euros.

Select the Prorate check box if you want to prorate the limit for employees who did not work for the whole reference period.

Rounding Rule

Select a rounding rule if you want the system to round employees' profit-sharing amount, deductions, and interest. The system rounds both gross and net amounts. Values are:

Standard: Rounds the results up or down. For example, if you specify 2 in the Decimal Places field, the result is rounded up if the digit in the third decimal place is 5 or more and it is rounded down if the digit is 4 or less. Therefore, 5154.525 is rounded to 5154.53 and 5154.523 is rounded to 5154.52.

Up: Rounds the result up to the number of decimal places specified in Decimal Places field.

Down: Rounds the result down to the number of decimal places specified in Decimal Places field.

Decimal Places

Enter the number of decimal places to which amounts are rounded. The system rounds the final amount only; all other intermediate calculations are not rounded.

Distribution Method

This group box defines how the global fund is distributed. Enter percentages of up to 2 decimal places. If you are setting up a worker's participation agreement, you can define different distribution methods at the agreement, establishment, or work unit level.

You can divide the global fund between employees based on one or more of the criteria described below:

Prorate with Salary

Enter the percentage of employees' funds that are based on their salaries. This part of each employee's fund is calculated with the following formula: $\text{global fund} \times (\text{employee annual salary} / \text{total annual payroll})$.

For worker's participation agreements, the system uses the variable KFMS to determine the total annual payroll of all employees. This variable is also used by the Compute Global Fund process if you specify the KF20PCTMS formula as the global fund limit formula. If you want the formula and the process to be based on different totals, you must create a new global fund limit formula for your worker's participation agreement which doesn't reference the KFMS variable.

Prorate with Working Duration

Enter the percentage of employees' funds that are based on the number of days they worked during the reference period. This part of an employee's fund is calculated with the following formula: $\text{global fund} \times (\text{employee work days} / \text{total days in the reference period})$.

The number of employee work days excludes most unpaid absence. However, some unpaid absence days, including maternity leave are included in the work day count.

Uniform Distribution

Enter the percentage of employees' funds that are based on the number of eligible employees. This part of an employee's fund is calculated with the following formula: $\text{global fund} / \text{total eligible employees}$.

Total (%)

Displays the total of all 3 distribution methods.

Note. To save this page, the total must be 100.00%.

You can use a mixture of all these methods to calculate the final profit share amount. Consider the following example:

Total fund	10000 euros
Total eligible employees	10

Total payroll for reference period	240000 euros
Total days in reference period	1000
Distribution Method:	
Prorate with Salary	30%
Prorate with Working Duration	30%
Uniform Distribution	40%

For an employee with an annual salary of 15000 euros and 100 days worked, the employee's fund is calculated as follows:

Note. The example shown assumes that the salary does not exceed the individual salary limit and is not prorated.

Profit share based on employee salary	$10000 \times (15000 / 240000) \times (30/100) = 187.5$
Profit share based on days worked	$10000 \times (100 / 1000) \times (30/100) = 300$
Profit share based on eligible employees	$(10000 / 10) \times (40 / 100) = 400$
Employee's Total Profit Share:	$187.5 + 300 + 400$

Defining Investment Methods

Access the Investment page.

Agreement
Computation
Investment

Agreement ID: KF1 Profit Sharing Agreement for Company KF1

Proposed Investments					
				Customize Find View All 	First  1-3 of 3  Last
	*Investment Method	*Description	Details	Proposed By Default	
1	Company Stock	Profit sharing invests in the company's stocks	Details	☐	
2	Company Investment	Profit sharing invests in the company	Details	☒	
3	Company Saving Account (PEE)	Profit sharing invests in the company's PEE	Details	☐	

Profit-Sharing Surplus

- ☒ Carryover
- ☐ Immediate Re-Share

Interest Re-Investment Option

- ☒ Immediate
- ☐ Re-Invest

Investment page

Proposed Investments

Investment Method

Select the investment methods available for the agreement type.

Bonds: For profit-sharing agreements only.

Company Investment: For profit-sharing agreements only.

Company Savings Account (PEE).

Company Stock: For profit-sharing agreements only.

Employee's Bank Account: For worker's participation agreements only. Funds are transferred to the employee's bank account which is defined on the Bank Accounts page.

FCP: For profit-sharing agreements only.

SICAV: For profit-sharing agreements only.

Time Saving Account: For worker's participation agreements only.

If an agreement has multiple investment methods, employees can select their investment method using the Agreement Personalization component or the Agreement Personalization self-service transaction.

Details

Click to access an investment detail page on which you enter details about the investment method. This button is hidden for some investment methods.

Proposed by Default

Select if the investment method is the default value. The default investment method is applied, unless an employee selects a different investment.

Profit Sharing Surplus

A surplus may occur when some funds remain after the initial distribution is calculated, due to limit formulas being applied. Use this group box to specify how the system manages surplus amounts.

Carryover	Select to add the surplus to the global fund for the next reference period. This option is available for profit-sharing agreements only. View the surplus using the Review Reference Period component.
Immediate Re-share	Select if you want to distribute the surplus among the eligible employees for the current reference period. The system recalculates the employees' fund to include a share of the surplus.
None	Select to ignore any surplus. If you select this option, the system doesn't distribute the surplus nor carry the surplus over to the next reference period. This option is available for worker's participation agreements only.

Interest Re-investment Option

This group box is for profit-sharing agreements with *Company Investment* selected as the investment method. Use it to specify how the interest earned on global funds is managed. Global funds accrue interest during the period that the funds are unavailable to employees. This period is defined on the Agreement page by the Unavailability Duration field.

Immediate	Select to pay interest to eligible employees. Interest is paid yearly on the first day of the fourth month after the end of the fiscal year. For example, for the reference period 2001, interest is calculated as of 1st April 2002 and paid on 1st April 2003, 1st April 2004, and so on until funds are released.
Re-Invest	Select to add the interest to the global fund. At the end of each interest period calculation, interest is added to the global fund. The next interest period calculation is based on this increased global fund.

Note. Employees can change this setting, using the Agreement Personalization component or the Agreement Personalization self-service transaction, when the agreement status is Approved.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Entering Additional Data in Human Resources Records,” Entering Bank Account Information

Chapter 6, “Profit Sharing for Employees,” page 61

PeopleSoft 8.8 eCompensation PeopleBook, “French Profit Sharing Self-Service Transactions”

Defining Company Investment Details

Access the Company Investment page.

Investment

Investment Method: Company Investment

Interest Rates					
Customize Find View All First 1 of 1 Last					
	*Effective Date	Status	Interest Rate		
1	01/01/2000	Active	5.000000	+	-

OK Cancel Refresh

Company Investment page

Interest Rate

Enter the interest rate (%) for the company investment. Interest rates are effective-dated so that you can track interest rate history.

Defining Company Savings Account Details

Access the Company Savings Account page.

Investment

Investment Method: Company Saving Account (PEE)

☒ Internal
☐ External

Financial Organization Address

Country: FRA France

Address: Edit Address

OK Cancel Refresh

Company Savings Account page

Internal

Select if the company savings account is owned by your organization.

External

Select if the company savings account is managed by a different organization and enter the address in the Address field. The address information is included in the agreement profit sharing report and administrators use this information when transferring funds.

Defining Company Stock Details

Access the Company Stock page.

Investment

Investment Method: Company Stock

Ticker Symbol: 4264

Financial Organization: BBO

Comment:

☒ **Attribution** ☐ **Subscription**

Financial Organization Address

Country: FRA France

Address: 12 Rue de la Paix
75008 PARIS PARIS CEDEX 08 [Edit Address](#)

Company Stock page

Ticker Symbol	Enter the symbol used for your company's stock.
Attribution	Select if employees receive company stock from the investment.
Subscription	Select if the investment provides employees with the right to buy company stock.

Setting Up Reference Periods

This section gives an overview of reference periods and discusses how to:

- Set up reference periods.
- Define payroll mapping.

Understanding Reference Periods

Profit sharing calculations are based on company or establishment accounting data over a period known as a reference period. Typically, reference periods are for a year and match the fiscal year. However, you can create reference periods for any period to suit your organizational requirements.

At the end of the reference period, when company information is available and employee salaries are finalized, the administrator schedules the profit sharing processes to calculate and distribute the global fund.

Agreements can cover one or more reference periods, depending on the agreement type and the agreement setup:

- Worker's participation agreements (*intéressement des salariées*) are typically for 3 years. If the reference period is a year, you create 3 reference periods, one for each year. However, if the reference period is 3 months, you define 12 reference periods for the agreement (4 reference periods a year $\times$ 3 years).
- Profit-sharing agreements (*participation aux résultats*) can have a fixed duration or an unspecified duration. If the duration is not defined, the administrator can create any number of reference periods.

You set up reference periods for an agreement only after the agreement is signed by all the relevant groups and the status is set to *Approved*.

To define reference periods for an agreement, you need to:

- Define how the Profit Sharing business process imports information from your payroll system. This is defined for each reference period.

The distribution calculations require employee payroll information, which is imported when the Extract Eligible Employees process runs.

- (Optional). Define the Carry Forward and Carry Over amounts for each reference period. This applies to profit-sharing agreements only.

When part of the global fund remains after distribution to employees, you can specify that the surplus is added to the fund for the next reference period. Equally, a surplus in the previous reference period can result in an amount being added to the current reference period. These values are automatically calculated by the system, but you can override the calculated values before running the remaining processes.

Understanding How to Set Up Payroll Information

When you set up a reference period, you must define where employee payroll information is stored because this is required for distributing the global fund.

The amount that an employee receives from profit sharing is based on:

- Gross salary.
- Days worked in the reference period.
- Number of eligible employees.

For the Distribute Global Fund process to calculate the profit share based on salary and days worked, it requires each employee's gross salary and total days worked during the reference period.

These values must take into account absences. The following types of absence must be included in the employees' total working days count and their gross salary amount:

- Paid vacations.
- Maternity leave.
- Adoption leave.
- Work accidents (except accidents that occur on journey between home and workplace).
- Absence due to occupational illness (*maladie professionnelle*).

The gross salary includes all compensation and benefits, before contributions such as the social security contribution and retirement contribution are deducted.

See [Chapter 3, “Setting Up Profit Sharing,” Defining the Agreement Calculation, page 20](#).

This payroll information is imported from one of two sources:

- Global Payroll for France.
- A record in the database that has been populated from other payroll systems.

The system checks the employee’s job data, as of the reference period end date, to determine which source to use for the import. If the Payroll System field on the Job Data - Payroll page is *Global Payroll*, the system imports from Global Payroll for France. If the Payroll field is set to any other value, the system imports from a record in the database.

Importing Data from PeopleSoft Global Payroll for France

PeopleSoft provide the following elements in Global Payroll for France for use with the Profit Sharing business process:

- Accumulators to track employees’ gross salary for the reference period.
- Accumulators to track the number of days worked in the reference period.
- Earnings from profit share or worker’s participation agreements.

The accumulators automatically include the paid absences that must be included in the salary and number of days worked. PeopleSoft delivers separate accumulators and earnings for profit sharing and worker’s participation agreements to allow for agreements that are based on different data. However, if your agreements are based on the same employee payroll information, you can remove the unused accumulators from the section PAR SE PARTICIP. This section is used to trigger the calculation of the accumulators used for the profit-sharing distribution.

See *PeopleSoft 8.8 Global Payroll PeopleBook*, “Defining Processing Elements,” Using Sections.

Importing Data from Other Payroll Systems

If you don’t have Global Payroll for France installed, you must populate a record in your database with employee payroll information. PeopleSoft delivers the record *PS_WP_EXT_PAYDATA* for this purpose.

The table below lists the fields in the *PS_WP_EXT_PAYDATA* record:

Field Name	Type	Length	Description
WP AGREEMENT ID	Char	5	Agreement ID
PERIOD ID	Char	12	Reference Period ID
EMPLID	Char	11	Employee ID
EMPL_RCD	Number	3	Employee Record ID
GROSS_PAY	Number	6.2	Employee’s relevant gross salary for the reference period.

Field Name	Type	Length	Description
DAYS	Number	3	Employee's relevant working days for the reference period.
CURRENCY_CD	Char	3	Currency code for the gross salary amount.

Pages Used to Set Up Reference Periods

Page Name	Object Name	Navigation	Usage
Reference Period	WP_AGRT_PERIOD	- Set Up HRMS, Product Related, Compensation, Profit Sharing FRA, Reference Period, Reference Period - Compensation, Profit Sharing FRA, Review Reference Period, Reference Period	Create and approve reference periods.
Payroll Mapping	WP_AGRT_PERIOD_SEC	Click the Payroll Map button on the Agreement Period page.	Define payroll data required by the profit sharing calculations.

Setting Up Reference Periods

Access the Reference Period page.

Reference Period

Agreement ID: KF1 Profit Sharing Agreement for Company KF1

Reference Periods Customize | Find First 1-2 of 2 Last

Reference Period	From Date	Thru Date	Status	Status Date	Personalization Deadline			
2001	01/01/2001	31/12/2001	Construction in Progress	04/06/2002		Payroll Map	+	-
2002	01/01/2002	31/12/2002	Construction in Progress	04/06/2002		Payroll Map	+	-

Reference Period page: Period tab

Reference Period

Enter the reference period ID. The system populates a reference period ID that you can override.

From Date, Thru Date

Enter the period start and end dates. The system automatically populates these dates based on the agreement approval date or the dates of existing reference periods. You can override these default dates.

If you haven't created reference periods for the agreement, the system populates the date fields for the year previous to the approval date, as follows:

- From Date is set to January 1 of the year before the agreement approval date.
- Thru Date is set to December 1 of the year before the agreement approval date.

The agreement approval date is defined on the Define Agreement — Agreement page.

If there are existing reference periods, the system populates the date fields starting the new reference period immediately after the end of the latest period with the same duration as the existing period.

Status

When you add the period initially, the system sets the status to *Construction in progress* and changes it to *Computed* when you run the Process Interest and Payment process.

After reviewing the profit sharing amounts calculated by the process, change the status to *Approved*. Once you set the status to *Approved*, you can't make other changes to the reference period.

Note. Employees can view their fund information only when the reference period status is *Approved*

Personalization Deadline

Enter the last date on which employees can change the investment method or interest re-investment options using the Agreement Personalization component or the self-service transactions. After this date, employees cannot change these agreement settings and funds can be transferred to the financial organization specified or paid through your payroll system.

If employees receive a payment or a transfer is completed before the personalization deadline, the system doesn't allow employees to update their agreement settings from this payment or transfer date.

Note. If you don't define a date, the system automatically prevents employees updating their agreement settings once the first reference period is approved.

Payroll Map

Click this button to define the location of payroll information. Profit sharing calculations depend on data imported from your payroll system.

Reference Period

Agreement ID: KF1 Profit Sharing Agreement for Company KF1

Reference Periods Customize | Find First 1-2 of 2 Last

Period	Carryover				
*Reference Period	Carry Over Amount		Carry Forward Amount		
2001	0.000000		0.000000	+	-
2002	0.000000		0.000000	+	-

Reference Period page: Carryover tab

Carry Over Amount

This field shows the amount carried over from the previous reference period. The Compute Global Fund process adds this amount to the global fund calculated.

Carry Forward Amount This field is for profit-sharing agreement types only. It shows the surplus amount that will be added to the global fund for the next reference period. This is calculated by the Distribute Global Fund process if you selected the Carryover option on the Define Agreement - Investment page.

Defining Payroll Mapping

Access the Payroll Mapping page.

Payroll Mapping

Agreement ID: KF1 Profit Sharing Agreement for Company KF1

Reference Period: 2001

Global Payroll Mapping

Gross Salary Accumulator: PAR AC SAL PART SG

Working Days Accumulator: PAR AC PRE PART SG

Payment Earning: INTERESSEMEN

External Payroll Record

Record: WP_EXT_PAYDATA

OK Cancel Refresh

Payroll Mapping page

Use this page to define the location of payroll information that is required for profit sharing. If you make changes to this page after running the Extract Eligible Employees process, you must rerun the process to take account of the modifications. You can't make changes to this page once the reference period status is *Approved*.

Note. If your organization uses Global Payroll for France and other payroll systems, define both Global Payroll Mapping and External Payroll Mapping. If you define both group boxes, the system uses the Payroll System field in the employee's job data to determine which source to use for the import.

Global Payroll Mapping

The system displays this group box if you have PeopleSoft Global Payroll for France installed.

Gross Salary Accumulator Select the accumulator defined in Global Payroll for France that stores employees' gross salary. PeopleSoft provide the following accumulators as standard:

PAR AC SAL PART SG for profit-sharing agreements.

PAR AC SAL INT SG for worker's participation agreements.

These accumulators store employees' gross salary during the reference period. This includes paid absences and some unpaid absences, such as maternity leave. The employees' gross salary is used by the Distribute Global Fund process to calculate employees' funds.

Working Days Accumulator

Select the accumulator defined in Global Payroll for France that track employees' working days in a reference period. PeopleSoft provide the following accumulators as standard:

PAR AC PRE PART SG for profit-sharing agreements.

PAR AC PRE INT SG for worker's participation agreements.

These accumulators store employees' working days, including paid absences and some unpaid absences, such as maternity leave. This is used by the Distribute Global Fund process to calculate employees' profit-sharing amount.

Payment Earning

Select the earning defined in Global Payroll for France for the payment of profit-sharing or worker's participation amounts. This earning is generated during payment processing. PeopleSoft delivers the following earnings as standard:

INTERESSEMEN for profit-sharing agreements.

PARTICIPATIO for worker's participation agreements.

External Payroll Mapping

If you use an external payroll system for some employees you must populate a record with payroll information required for the profit-sharing calculations.

Record Name

Select the record that stores your payroll information. PeopleSoft delivers the *PS_WP_EXT_PAYDATA* record that has the correct structure. If you use a different record make sure that the record has the same field names, types, and length as those defined in *PS_WP_EXT_PAYDATA*.

See Also

Chapter 3, "Setting Up Profit Sharing," Defining the Agreement Calculation, page 20

Setting Up Workflow for Profit Sharing

PeopleSoft delivers workflow for the profit sharing business process that enables automatic notification of profit sharing events to employees and compensation administrators. The following table lists the events that trigger workflow:

Event	Role	Description
Employee termination	Employee	Employees who are leaving receive an email informing them that they are entitled to profit sharing and can request a release or organize transfer of funds. A worklist entry directs the employee to the Agreement Personalization page.
Terminated employee enters transfer information	HR Administrator FRA	An email informs the administrator about terminated employees who have entered transfer information. A worklist entry directs the administrator to the Member Entitlements page.
Employee submits request for fund release	HR Administrator FRA	An email informs the administrator about new requests and a worklist entry directs the administrator to the Member Entitlements page.
Administrator approves or rejects fund release request	Employee	An email is sent to the employee that includes the agreement ID, and the reference period ID for the request that has been approved or rejected.
The Process Interest and Payment process sets fund status to <i>Available</i>	Employee	Emails are sent to employees when funds are available.
The Process Interest and Payment process sets fund status to <i>Paid</i>	Employee	Emails are sent to employees when a payment has been processed by Global Payroll for France or another payroll system.
The Process Interest and Payment process sets fund status to <i>Error</i>	HR Administrator FRA	An email informs the administrator if errors occur in payment processing.

See Also

Chapter 5, “Reviewing and Reporting Employee Profit Sharing Information,” page 49

Chapter 4, “Running the Profit Sharing Processes,” Understanding the Process Interest and Payment Process, page 42

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft Workflow”

CHAPTER 4

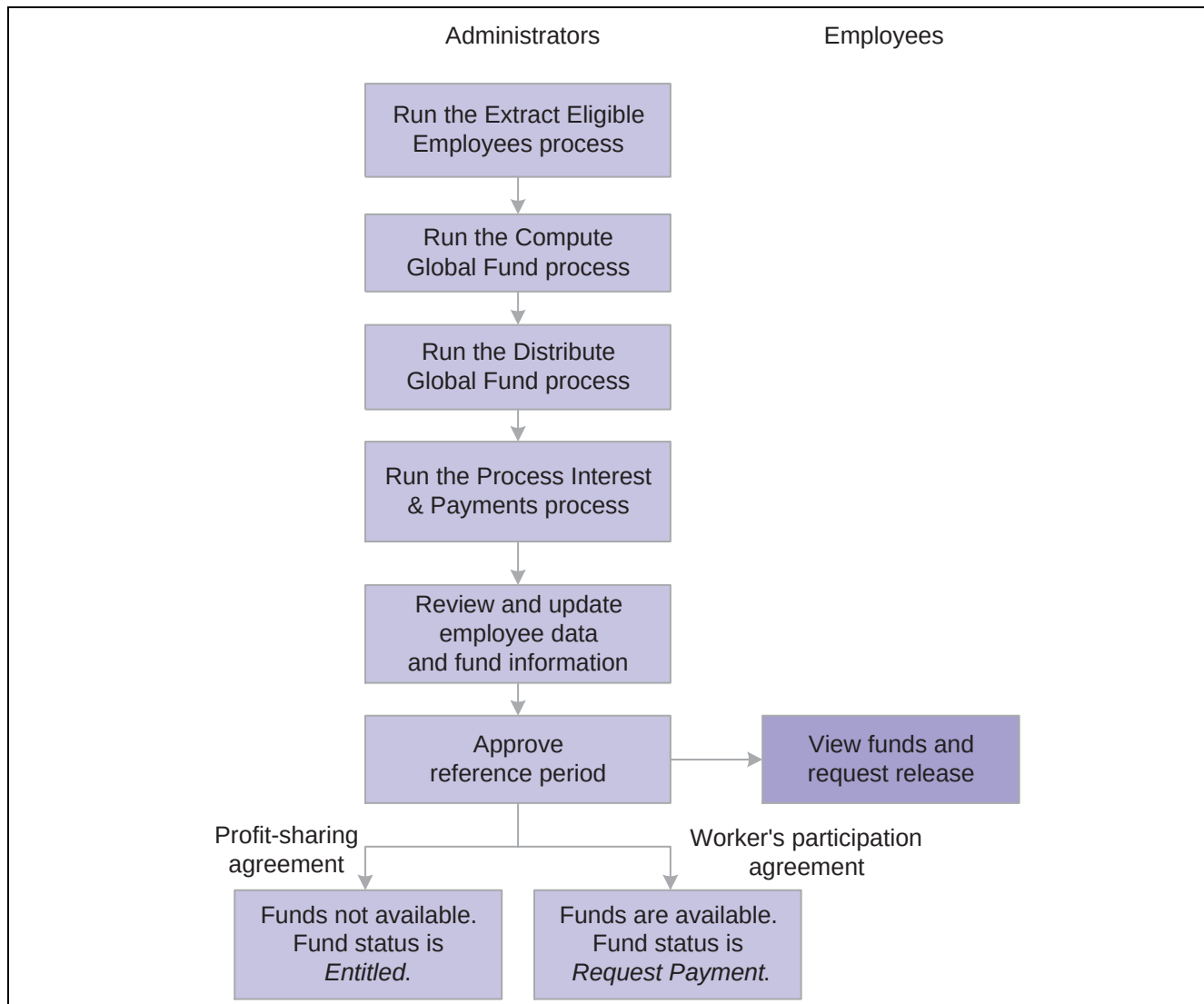
Running the Profit Sharing Processes

This chapter provides an overview of the profit sharing processes and discusses how to:

- Run the eligibility and calculation processes.
- Run the Process Interest and Payment process.
- Check the results of the processes.
- Approve the reference period.

Understanding the Profit Sharing Processes

At the end of a reference period, the compensation administrator runs the profit sharing processes to calculate the global fund available and each employee's share of the fund. The following diagram illustrates the steps involved:



Profit sharing processes

The four profit sharing processes that must be run are:

- Extract Eligible Employees

This is the first process run and it compiles a list of employees who are entitled to share the global fund. It also imports payroll information for eligible employees from Global Payroll for France or from a specified record in the database.

- Compute Global Funds

This process calculates the global fund available, based on the funding formulas defined in the agreement. For worker's participation agreements, there can be multiple formulas for different establishments or groups of employees (work units).

- Distribute Global Funds

The Distribute Global Funds process divides the global funds previously by the Compute Global Fund process, the process distributes the fund according to the distribution methods specified in the agreement definition.

- Process Interest and Payment

This is the final process to run. This process has a dual role, it completes the profit-sharing calculations and also processes payments. The process calculates deductions for employees' funds and calculates interest that is due for profit-sharing funds with *Company Investment* selected as the Investment Method. If you integrate your system with PeopleSoft Global Payroll for France or another payroll system, the Process Interest and Payment process manages payments for profit-sharing and worker's participation agreements.

Typically, you run the first three processes (Extract Eligible Employees, Compute Global Fund, and Distribute Global Fund) once for each reference period. However, the Process Interest and Payment process is run at intervals because it processes payments, updates interest amounts and fund status, as well as calculating funds.

Compensation administrators can review the results of each process and make any adjustments necessary before running the next process in the sequence. The Member Entitlements component provides administrators with a view of the results generated by the eligibility and calculation processes. In addition, compensation administrators can rerun processes before moving on to the next stage.

See Also

Chapter 5, "Reviewing and Reporting Employee Profit Sharing Information," Reviewing Member Information and Processing Fund Release Requests, page 49

Understanding the Extract Eligible Employees Process

The Extract Eligible Employees process is the first process you run. The purpose of this process is to determine who is eligible for a share of the funding, and import gross salary and a count of the days worked, for each eligible employee.

For each agreement you specify on the run control page, the process compiles a list of employees in the company and establishments specified in the agreement.

For each employee, the process:

- Determines whether the employee is eligible as follows:
 - If you don't specify a minimum seniority on the Define Agreement - Computation page, the system checks that the employee worked for the company or establishment for at least one day during the reference period.
 - Calculates the employee's length of service if you have defined a minimum seniority for the agreement. Seniority is calculated using the employee's contract begin and end dates. For employees with multiple contracts, the system calculates the total duration of all the contracts during the reference period, and for the 12 months prior to the start of the reference period. Employees who don't meet the seniority criteria are not eligible for a share of the funds.

Note. If an employee is transferred to a different company during the reference period, and keeps the same contract number, the process adds the employee to the message log. You must check the list of transferred employees to determine whether they are eligible for profit sharing.

- Imports eligible employees' gross pay and the number of days worked during the reference period.

These amounts are used later by the Distribute Global Fund process to calculate the employee's fund. Payroll data is imported from accumulators defined in Global Payroll for France or from a record populated with employee payroll information.

You define the location of payroll data when you set up the reference periods for the agreement. The process checks employees' job data to determine whether to import data from Global Payroll for France or the external record.

- Calculates the employee's proration factor based on the number of days worked.

One of the distribution methods for dividing global funds between employees is based on the number of days the employee worked during the reference period. The process calculates this proration factor by dividing the number of days worked by the total days, including weekend days, for the reference period (Reference Period end date - Reference Period begin date). You define the distribution methods on the Define Agreement - Computation page.

Once this process is complete, the Compensation Administrator can review employees' gross salaries and proration factor using the Member Entitlements page.

See Also

[Chapter 5, "Reviewing and Reporting Employee Profit Sharing Information," page 49](#)

[Chapter 3, "Setting Up Profit Sharing," Defining the Agreement Calculation, page 20](#)

[Chapter 3, "Setting Up Profit Sharing," Defining Payroll Mapping, page 33](#)

Understanding the Compute Global Fund Process

The Compute Global Fund process is the second process to run and it must be run after the Extract Eligible Employees process. The purpose of the Compute Global Fund process is to calculate the global fund amounts for the agreements you specify on the run control page. Once this process has completed, the compensation administrator reviews the calculated amounts using the Member Entitlements pages.

The global fund is the total amount that is available for distribution between eligible employees and it is based on your organization's accounting information. To calculate the global fund, the process uses the following formulas specified on the Define Agreement - Computation page:

- Funding Formula
- Global Fund Limit Formula

This formula defines the global fund limit. For worker's participation agreements, PeopleSoft delivers the statutory formula, KF20PCTMS, that checks whether the global fund is more than 20% of the total payroll. If the result of the Funding Formula exceeds this limit, the process sets the global fund amount to this limit and issues a warning message.

For profit-sharing agreements, the process compares the global fund with the result of these formulas, if you don't specify the legal formula *LEGAL_RSP* in the Funding Formula field:

- The global fund limit formula. There are four limit formulas possible, *LEGAL_MAX1*, *LEGAL_MAX2*, *LEGAL_MAX3*, and *LEGAL_MAX4*. If the result of your funding formula is above the selected global fund limit formula, the process sets the global fund to the limit and issues a warning message.
- The *LEGAL_RSP* formula. If the result of your funding formula exceeds the result calculated using the *LEGAL_RSP* formula, the process issues a warning message. .

For profit-sharing agreements, there is only one funding formula and global fund limit formula per agreement. Therefore, the global fund is the same for all employees associated with that profit-sharing agreement.

However, for worker's participation agreements, it is possible to define formulas (and distribution methods) at the agreement, establishment, or work unit level. The Compute Global Fund process checks which formulas apply for each eligible employee and calculates the global fund amount according to those formulas. The process determines which formulas apply as follows:

- The work unit formulas override the formulas defined at the agreement or establishment level.

Note. The process can only use one set of formulas. Therefore, you must make sure that employees belong to one work unit only for each agreement. Use the Group Member Overlap report to determine whether employees belong to more than one work unit.

- The establishment formulas override the formulas defined at the agreement level.
- The agreement level formulas apply if an employee doesn't belong to any of the work units or establishments listed on the Define Agreement - Computation page.

Worker's Participation Example

Let us consider an example agreement, KF1. This agreement is for company GBL001 which includes establishments EST001, EST002, and EST003.

Agreement KF1 has different formulas and distribution methods for the following establishments and work units:

Computation Level	Establishment or Work Unit
Establishment	EST001, EST002
Work Unit	WU1, WU2, WU3

If an employee belongs to:

- Establishment EST001 and work unit WU1, the system uses the formulas and distribution methods defined for the work unit WU1.
- Establishment EST002 but none of the work units WU1, WU2, or WU3, the system uses the formulas and distribution methods defined for establishment EST002.
- Establishment EST003, the system uses the formulas and distribution methods defined at the agreement level.

See Also

Chapter 5, "Reviewing and Reporting Employee Profit Sharing Information," page 49

Understanding the Distribute Global Funds Process

The Distribute Global Funds process is run after the Compute Global Fund process. Using the global fund amounts that are calculated by the Compute Global Fund process, and the payroll information previously imported by the eligibility process, the Distribute Global Fund process calculates each employee's share of the fund.

The process completes the following calculations:

- Calculates the employee's fund based on the distribution methods selected in the agreement definition.

If an employee's fund exceeds the limit specified by the Individual Allocation Limit formula (if this is defined), the process sets the employee's fund to the maximum and issues a warning message.

- Distributes any surplus, if the Immediate Re-share check box is selected on the Define Agreement - Investment page.

If there is a surplus after the initial calculations, the process recalculates the employee funds as described below:

- Employees whose fund is at the Individual Allocation Limit are frozen.
 - For employees who are not frozen, the process recalculates funds including the surplus amount.
 - If there is surplus at the end of this recalculation, the steps are repeated until the surplus is zero or the number of iterations is ten.
- Sets the availability or payment date as follows:
 - For profit-sharing agreements, the availability date is determined by the unavailability duration defined in the agreement. Payment date is set to 1st day of the fourth month after the reference period end date + unavailability duration. For example, if the reference period end date is December 31, 20 01, and the unavailability duration is 5 years, the availability date is set to April 1, 2007.
 - For worker's participation agreements, the payment date is set to the current date (payment is available at the end of the reference period). Normally, payments for this type of agreement should be made within 7 months of the reference period end date. The process issues a warning message if the payment date is after this 7 month deadline.
 - Sets the payment status to *Entitled* for profit-sharing agreements, and to *Request Payment* for worker's participation agreements.

Note. The payment date is not a fixed date and can be overridden. For profit-sharing agreements, the payment date is changed for employees who request early release of funds. In addition, if you run the Process Interest and Payment process after the payment date calculated by the distribution process, the payment process sets the payment date to the current date.

See Also

Chapter 3, "Setting Up Profit Sharing," Defining the Agreement Calculation, page 20

Understanding the Process Interest and Payment Process

The Process Interest and Payment process is the final process you run before you approve the reference period. The Process Interest and Payment process calculates deductions and interest, and processes payments. The process is run at least once a year, but is most likely run at intervals during the year to process employee fund releases. Fund status and interest amounts are more accurate if you run the process often throughout the year.

When you run this process it completes the following:

- Calculates deductions for employees' funds, and the net global fund after deductions have been deducted from the gross amounts. Profit-sharing and worker's participation amounts are liable to CSG and CRDS deductions. The rates of these deductions are stored in the variables KFCSG (for CSG) and KFCRDS (for CRDS).
- Calculates interest for employees whose profit-sharing agreements have *Company Investment* selected as the Investment Method. Interest is calculated yearly on employees' funds during the

period that funds are unavailable. The interest rate is defined in the agreement definition and employees can select to reinvest interest or receive interest payments.

Note. For worker's participation agreements, interest payments are paid only in exceptional circumstances when payment of funds is delayed. The Interest and Payment process does not calculate interest for this agreement type.

- Calculates deductions on interest payments, and the net interest amount. Interest payments are liable to CSG, CRDS, and *Participation Sociale* deductions. The rate of the *Participation Sociale* deduction is stored in the variable KFSOC.
- Sets the reference period status to *Computed*.
- Processes payments for profit-sharing funds with *Company Investment* as the investment method and worker's participation funds with *Employee's Bank Account* as the investment method. Payments are processed only if the reference period is *Approved* and the fund status is *Request Payment*. Fund status is changed to *Sent to payroll* by the process.
- Receives information from Global Payroll for France or another payroll system about the status of payments previously sent and updates fund status accordingly. Payments that have been processed successfully are assigned a status of *Paid*. If a payment was not processed, the process changes the fund status to *Error*.

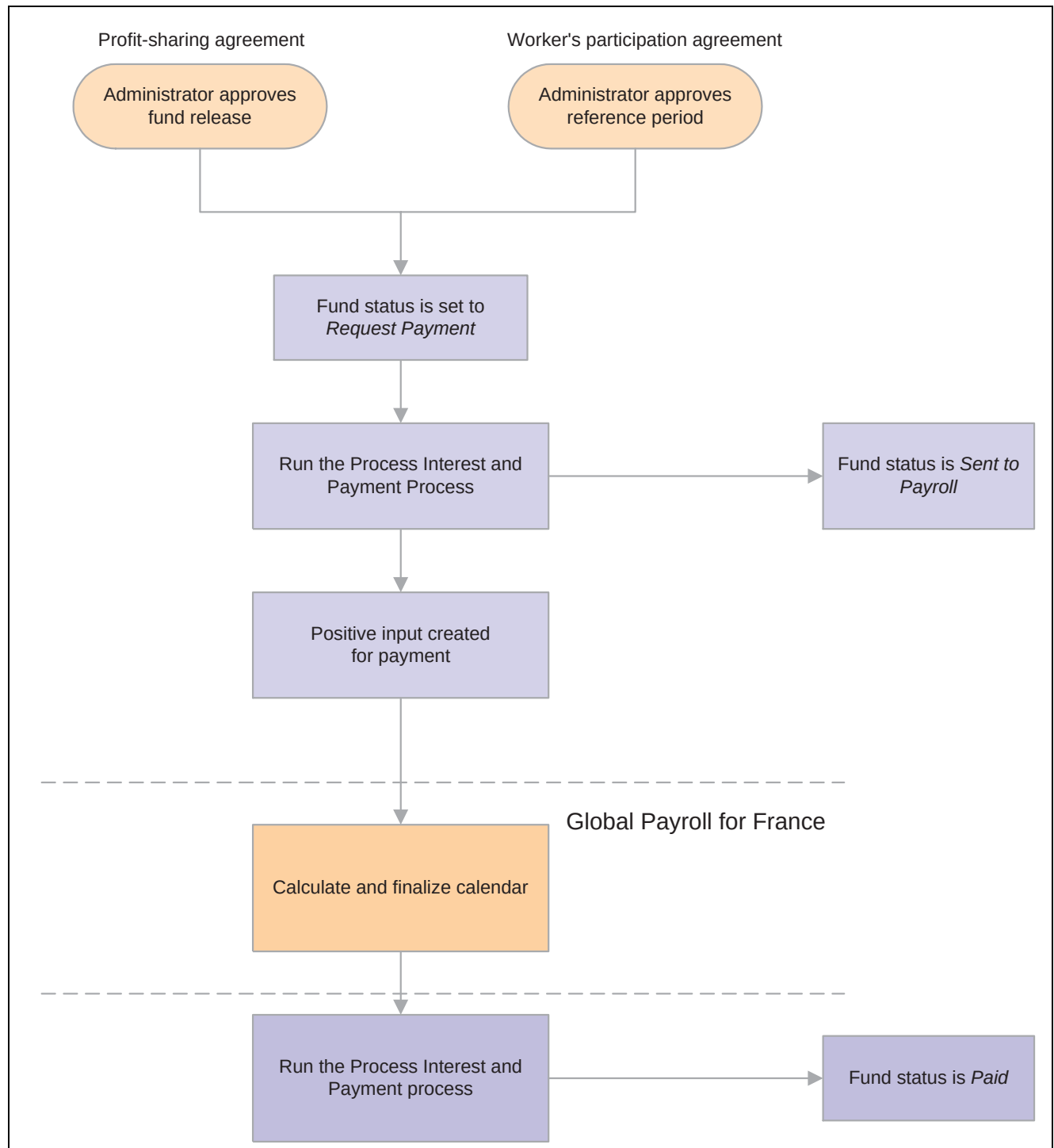
Workflow is triggered when the Process Interest and Payment process updates employees' fund status to:

- *Available* or *Paid*. This triggers an email to the employees informing them that their funds are available or paid.
- *Error*. This triggers an email to the compensation administrator who must investigate the error.

See [Chapter 3, "Setting Up Profit Sharing," Setting Up Workflow for Profit Sharing, page 34](#).

Integrating with PeopleSoft Global Payroll for France

If you have Global Payroll for France installed, you can use it to automatically process payments as shown in the following diagram:



Overview of Payment Processing

Integrating with Other Payroll Systems

If you want to integrate the Profit Sharing business process with a payroll system other than Global Payroll for France, you must set up the Enterprise Integration Points (EIPs) that enable payment information to be exchanged.

For details of the Enterprise Integration Point (EIP), refer to the online EIP Catalog database that can be found under Open Integration Framework in the Documentation section of Customer Connection.

See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Understanding Enterprise Integration Points in HRMS”.

See *PeopleSoft Enterprise Integration PeopleBook*

Running the Eligibility and Calculation Processes

This section explains how to run the eligibility and calculation processes.

Prerequisites

The Extract Eligible Employees process runs only if the following conditions are met:

- The agreement has an Approved status.
- A reference period is defined for the agreement. Also, the process only runs after the reference period end date.
- Contract data exists for your employees if you have defined eligibility criteria. The process uses contract dates to calculate seniority.
- Payroll information is set up. The Extract Eligible Employees process imports employees' gross salary and total days worked from these sources:
 - Global Payroll for France. Accumulators track employees' salaries and number of days worked. These must be included in your process lists and the payroll for the whole reference period must be finalized.
 - The record WP_EXT_PAYDATA, if an employee's payroll is not managed by Global Payroll for France. You must ensure this record is populated with employee payroll data.
- If you have Global Payroll for France installed, you should also set it up as follows before running the eligibility process:
 - Include the element group PAR EG PARTICIPAT in the employees' eligibility group.
 - Include the section PAR SE PARTICIP in the process list.

Before running the Compute Global Fund process, you must ensure that any variables associated with the funding and limit formulas are populated with the correct values for the reference period.

For the Distribute Global Fund process to run correctly, ensure that the following variables are populated with the correct values for the reference period:

- Variables associated with the Individual Allocation Limit formula.
- The KFMS variable (for worker's participation agreements only). This variable determines the total salary which is used in the distribution calculation based on employee's salaries.

Note. Make sure that your variables are defined with the correct scope for the agreement.

See Also

Chapter 3, “Setting Up Profit Sharing,” page 9

Common Elements Used in This Section

Agreement ID	Select the agreements you want to process.
Reference Period	Select the reference periods you want to process.
Re-Initialize?	Select if you want to override existing results. If you have previously run the process for the selected agreement and reference period, the system overrides the results and any manual adjustments you have made will be lost. If you don't select this check box, and you have previously run the process for the agreement and reference period, the process doesn't run and a warning is added to the log file.

Pages Used to Run the Eligibility and Calculation Processes

Page Name	Object Name	Navigation	Usage
Eligib. Process	RUNCTL_WP_ELIG	Compensation, Profit-Sharing FRA, Compute Profit Sharing, Extract Eligible Employees, Eligib. Process	Run the Extract Eligible Employees process for selected agreements and reference periods.
Gbl Fund Process	RUNCTL_WP_FUND	Compensation, Profit Sharing FRA, Compute Profit Sharing, Compute Global Fund, Gbl Fund Process	Run the Compute Global Fund process to calculate the global funds available. It must be run after you have identified eligible employees using the Extract Eligible Employees process.
Profit Shrg Process	RUNCTL_WP_COMP	Compensation, Profit Sharing FRA, Compute Profit Sharing, Distribute Global Funds, Profit Shrg Process	Run the Distribute Global Funds process to calculate each eligible employee's share of the global fund. This process can only be run after you have run the Extract Eligible Employees process and the Compute Global Fund process.

Running the Process Interest and Payment Process

This section explains how to run the Process and Interest Payment Process.

Prerequisites

The first time you run the Process Interest and Payment process for a reference period, you must run it after you have run these processes:

- Extract Eligible Employees
- Compute Global Fund
- Distribute Global Fund

If you have Global Payroll for France installed, you also need to define the earning used for profit-sharing and worker's participation payments before running the process. Define the earning on the Payroll Mapping page.

Page Used to Run the Process Interest and Payment Process

Page Name	Object Name	Navigation	Usage
Payment Process	RUNCTL_WP_PAYMT	Compensation, Profit Sharing FRA, Compute Profit Sharing, Process Interest and Payment, Payment Process	Run the process for a selected agreement and reference period.

Running the Payment Process

Access the Payment Process page.

Payment Process

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#) **Run**

Agreement ID:

Reference Period: Status: Construction in Progress

Calendar List		Customize	Find	First	1 of 1	Last
	*Pay Group	Calendar ID				
1	GFPGMEN101	GF01/2001FR101				

Payment Process page

Agreement ID Select the agreement for which you want to run the process.

Reference Period Select the reference period you want to run the process for.

Calendar List

Pay Group The system populates this field with the pay groups for all eligible employees, based on the selected agreement and reference period. Check the list of pay groups and add additional pay groups if there

were changes since you ran the Extract Eligible Employees process. For example, you need to add pay groups if:

- An employee changed pay group after you ran the Extract Eligible Employees process and the new pay group isn't listed
- You manually added employees to the list of eligible employees after you ran the Extract Eligible Employees process and their pay groups aren't listed

Calendar ID

Select the calendar for each pay group selected.

Reviewing the Results of the Processes

When you run any of the profit-sharing processes, you must check the message log generated by the process to check for errors or warning messages. Navigate to the message log from the run control pages as follows: Process Monitor, Process status, View log/Trace

You can view the results of the process using the Member Entitlement component which lists the eligible employees and the results of the calculations.

See Also

Chapter 5, "Reviewing and Reporting Employee Profit Sharing Information," page 49

Approving the Reference Period

When you have run all the profit sharing processes and you are satisfied with the results, you must change the status of the reference period to *Approved*. Use the Reference Period component to change the status. Navigate to the component as follows: Compensation, Profit Sharing FRA, Review Reference Period, Reference Period.

Note. Employees cannot view their profit sharing funds until you change the reference period status to Approved.

See Also

Chapter 3, "Setting Up Profit Sharing," Setting Up Reference Periods, page 28

CHAPTER 5

Reviewing and Reporting Employee Profit Sharing Information

This chapter gives an overview of the options available to compensation administrators for managing profit sharing information, and discusses how to:

- Review profit sharing members and process fund release requests.
- View global fund calculation information.
- View employee release details.
- Print reports of employee funds.

Reviewing Member Information and Processing Fund Release Requests

The Member Entitlements component is central to administration of the profit sharing business process. Compensation administrators use the component to review and adjust the results of the profit sharing processes, process fund release requests submitted by employees, and track fund transfers. The system populates the Member Entitlement component with results of the profit sharing processes as follows:

- After running the Extract Eligible Employees process, the component lists the employees who are eligible for profit sharing. You can make the following changes before running the Compute Global Fund process:
 - Add or remove employees from the eligible employees list.
 - Modify some employee details such as the prorate factor and the employee salary.
- After running the Compute Global Fund and Distribute Global Fund processes, the component includes the employees' profit sharing amount. You can adjust the employee's fund before running the Process Interest and Payment process.
- After running the Process Interest and Payment process, the component includes a breakdown of the deductions, gross, and net amounts for the employees' funds. If interest is payable, this is also displayed for the employee.

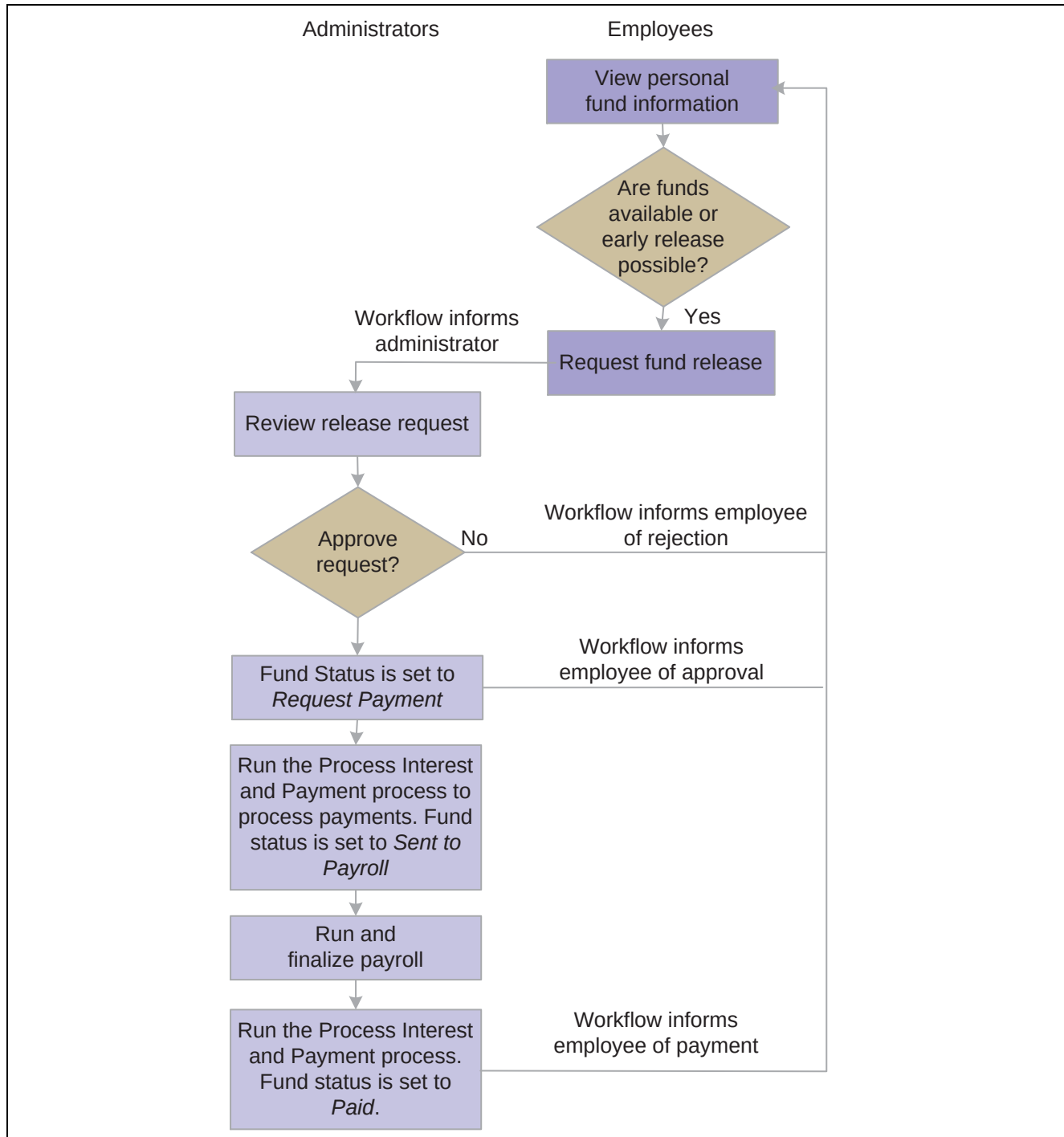
Processing Fund Release Requests

Profit-sharing agreements do not allow for automatic payment of funds, except where the fund amount is below a defined threshold (the variable KFIMMED stores this threshold value). If an employee's fund amount is above the threshold, the employee must submit a request for fund release. These requests are reviewed and approved by the compensation administrator.

Employees can submit fund release requests only after the reference period status is *Approved*.

Note. Fund release requests only apply to agreements with *Company Investment* selected as the investment method. Fund releases for other types of investment are managed outside the system.

The following illustration shows how fund releases are processed and when workflow is triggered:



Fund Release Request Process

Processing Terminated Employees

When employees leave your organization, they can request a fund release, request fund transfer to the new company, or leave the fund unchanged.

Workflow keeps the compensation administrator informed of terminated employees as follows:

- When the workforce administrator inserts a termination action into an employee's job data this triggers workflow if the employee is eligible for profit sharing. An email notifies the employee that he or she is entitled to funds from a profit-sharing agreement. A worklist entry takes employees to the Fund Release page where they submit a release request. Alternatively, employees can go to the Agreement Personalization page where they enter details of the financial organization to which funds should be transferred.
- Employees who want to transfer funds, enter the fund transfer information using the Agreement Personalization page. This triggers an email to the compensation administrator (role HR Administrator FRA) with details of the employee ID, agreement ID, and period ID. The administrator organizes transfer of funds and records the transfer by updating the terminated employee's fund status to *Posted to Account*, using the Member Entitlement component.

See Also

[Chapter 6, "Profit Sharing for Employees," page 61](#)

Pages Used to Review Member Information

Page Name	Object Name	Navigation	Usage
Profit-Sharing Member	WP_PSHRG_MAIN_TBL	Compensation, Profit Sharing FRA, Manage Profit Sharing, Member Entitlements, Profit-Sharing Member	Review the results of the profit sharing processes for a selected agreement.
Global Fund Computation Level	WP_PSHRG_EEDTL_SEC	Click the  (View) button on the Profit-Sharing Member page.	View the global fund formula used to calculate the selected employee's global fund. This page is available for worker's participation agreements only.
Employee Release Detail	WP_PSHRG_VSTDT_SEC	Click the  (Employee Release Detail) button on the Profit-Sharing Member page.	View full details of the employee's profit sharing amount, interest (if applicable), and fund release requests. This page gives a breakdown of the gross amount, deductions, and net amount. You can adjust calculated amounts, if required, and approve or reject the employee's fund release requests.

Reviewing Member Details

Access the Profit-Sharing Member page.

Profit-Sharing Member

Agreement ID: KF1 KF1
Long Description: Profit Sharing Agreement for Company KF1
Agreement Type: Profit Sharing
Agreement Status: Approved
Agreement Start Date: 01/01/2000

Employee Name:
Employee ID:
☐ **Release Request** **Period ID:** 1 to 6 of 6

Employee Distribution
Employee Salaries

	*Employee ID	Name	Empl Rcd#	*Period ID	Prorate Factor	Profit-Sharing Amount	Release Request			
1	KF0015	Levasseur, Jean-Pierre	0	2001	1.000000	1,385.95 EUR	☐			
2	KF0017	Ledoux, Louis	0	2001	1.000000	1,408.63 EUR	☐			
3	KF0019	Louzaouen, Michel	0	2001	1.000000	1,442.94 EUR	☐			
4	KF0030	Lacombe, Laurent	0	2001	1.000000	1,906.84 EUR	☐			
5	KF0031	Latour, Vincent	0	2001	1.000000	1,907.84 EUR	☐			
6	KFGE0006	Libarian, Estelle	0	2001	0.000000	262.74 EUR	☐			

Profit-Sharing Member page: Employee Distribution tab

After you run the Extract Eligible Employees process for a selected agreement, the system populates this page with employees who are eligible for a share of the global fund. The Extract Eligible Employees process compiles this list using the eligibility criteria specified in the agreement.

You can add or remove employees from the list of eligible employees if necessary. However, if you add employees manually you must enter their salary information. If you add an employee after running the Distribute Global Funds process, you must rerun the process or enter the employee's fund amount.

Release Request

Select this check box if you want to search for employees who have requested a fund release.

Period ID

Displays the reference period for which the employee is eligible.



(view)

Click this button to view the computation level and funding formula that was used to calculate the global fund. This button is available for worker's participation agreements only.

Prorate

One of the distribution methods for profit sharing is based on the number of days worked by the employee during the reference period. This field shows the proration factor calculated by the Extract Eligible Employees process by dividing the employee's working days by total working days in period. This factor is used later by the Distribute Global Fund process.

If you update the proration factor, the system displays a message warning you that the profit-sharing amount for the employee may not be consistent

with the changed proration factor. If you have already run the Distribute Global Fund process, the employee's profit sharing is based on the previous value. In this case, you must manually update the profit-sharing amount or rerun the Distribute Global Fund process.

Profit-Sharing Amount

If you have run the Distribute Global Fund process for the reference period, this field is populated with the amount the employee will receive from profit sharing. To change the employee's fund amounts, click the Employee Release Detail button.

Release Request

This check box is automatically selected if the employee has submitted a fund release request. Once you approve or reject a request, the system clears the check box. Click the Employee Release Detail button to view the request and approve or reject it.



(employee request detail)

Click to check whether the employee has requested a fund release.

Employee Distribution Employee Salaries									
*Employee ID	Name	Empl Rcd#	*Period ID	Employee Salary	(Max. applied)	Global Fund			
1 KF0015	Levasseur,Jean-Pierre	0	2001	18,541.00	18,541.00	55,174.52	EUR		
2 KF0017	Ledoux,Louis	0	2001	19,541.00	19,541.00	55,174.52	EUR		
3 KF0019	Louzaouen,Michel	0	2001	21,054.00	21,054.00	55,174.52	EUR		
4 KF0030	Lacombe,Laurent	0	2001	41,510.00	41,510.00	55,174.52	EUR		
5 KF0031	Latour,Vincent	0	2001	41,554.00	41,554.00	55,174.52	EUR		
6 KFGE0006	Libarian,Estelle	0	2001	0.00	0.00	55,174.52	EUR		

Profit-Sharing Member page: Employee Salaries tab

Employee Salaries

Employee Salary

This field displays the employee's salary. This information is imported from PeopleSoft Global Payroll for France or from another payroll system when you run the Extract Eligible Employees process.

(Max. applied) (maximum applied)

This field displays the employee's salary, after the maximum limit is applied. This value is calculated by the Extract Eligible Employees process using the Individual Salary Limit Formula specified in the agreement.

Global Fund

This field displays the global fund calculated by the Compute Global Fund process.

Viewing Global Fund Calculation Information

Access the Global Fund Computation Level page.

Global Fund Computation Level

Agreement ID: KF3 Worker's participation agreement for group KFG002

Employee ID:

Empl Rcd Nbr: 0

Reference Period:

Computation Level

☐ Agreement Level
☐ Establishment Level
☐ Work Unit Level

Global Fund Formula:

[View Agreement](#)

[Return](#)

Global Fund Computation Level page

Reference Period Displays the period ID shown on the Member Entitlements page.

View Agreement Click this link to view the agreement definition pages.

Computation Level

Worker's participation agreements can have multiple formulas for calculating global funds. Formulas are defined for all employees associated with the agreement, for employees in specific establishments, or employees in specific work units. This group box displays the formula that applies to the selected employee.

Global Fund Formula Displays the funding formula used to calculate the employee's global fund. The funding formulas are defined on the Define Agreement - Computation page.

See Also

[Chapter 3, "Setting Up Profit Sharing," Defining the Agreement Calculation, page 20](#)

Viewing Employee Release Details

Access the Employee Release Detail page.

Employee Release Detail

Agreement ID: KF1 Profit Sharing Agreement for Company KF1
Employee ID: KF0001 Berger,Maurice
Empl Rcd Nbr: 0
Period ID: 2001

Profit-Sharing Details							
#	Profit-Sharing Gross Amount	Profit-Sharing Deductions	Profit-Sharing Net Amount		Availability/Payment Date	Fund Status	
1	426.51	32.41	394.10	EUR	01/04/2007	Entitled	+

Interest Payment Details								
*From Date	*Thru Date	Interest Gross Amount	Deductions on Interests	Interest Net Amount		Payment Date	*Status	*Option
01/04/2002	05/11/2002	11.82	0.00	0.00	EUR	01/04/2003	Entitled	Immedia

OK Cancel Refresh

Employee Release Detail page

Release Request

This group box appears if the selected employee has submitted a request to release funds. It is relevant for profit-sharing agreements only.

Release Request

This field indicates the type of fund release requested. Values are:

Amount: Employee requested release of a specific amount shown in the Release Amount field.

Total: Employee requested release of the entire fund. The total is shown in the Release Amount field.

Release Date

The date when the employee submitted the fund release request.

Event

This is the event that the employee selected for the fund request and the date on which the event occurred is shown in the Event Date field.

Request Status

The status of the fund release request: *New* for a new request, *Approved*, or *Rejected*.

Approve

Click to approve the request. This triggers workflow to notify the employee that the request is approved and changes the fund status to *Request Payment*.

Reject

Click to reject the request. This triggers workflow to notify the employee that the request was rejected.

Profit Sharing Details

Profit-Sharing Gross Amount

The employee's fund calculated by the Distribute Global Fund process.

Profit-Sharing Deductions

Displays the deductions on the employee's fund that are calculated by the Process Interest and Payment process.

Profit-Sharing Net Amount

The amount payable to the employee after deductions are made.

Availability/Payment Date

Date that the employee is due to receive payment or the date on which funds become available as follows.

- If the Fund Status is *Entitled*, this field shows the date on which funds are available to employees. Employees can request fund release without conditions from this date.
- If the Fund Status is *Request Payment*, *Sent to Payroll*, or *Paid* this field shows the payment date.

The date is defined by the Distribute Global Funds process and the Process Interest and Payment process. You can override it if Fund Status is one of: *Entitled*, *Available*, *Request Payment*, *Error*, or *Canceled*.

Fund Status

The Distribute Global Funds process and the Process Interest and Payment process assign a fund status, but you can change the status as required:

Entitled: Indicates that the employee's fund has been calculated but the money is unavailable. This status applies to profit-sharing agreement types only.

Available: Indicates that the employee's fund is available. For worker's participation agreements, the fund is available as soon as it is calculated. For profit-sharing agreements, funds are available after the end of the unavailability period defined for the agreement.

Canceled: Cancels the profit-sharing amount. Use this status when you find an error in an employee's fund after running the distribute global fund process. To correct such a problem, you cannot run the process again or delete the employee data. Instead, set the fund status to *Canceled* and insert a new row for the employee with the correct amount. Using the *Canceled* status you can track the cancellation and the manual adjustments.

Sent to Payroll: Indicates that the Process Interest and Payment process has run and the profit-sharing amount has been sent to Global Payroll for France.

Posted to Account: Indicates that funds have been transferred to an external organization. The financial organization is defined in the Define Agreement component. Terminated employees can override the default organization for transfer of their entitlement to their new company fund.

Paid: Indicates that the payment has been processed by your payroll system. If you have Global Payroll for France installed and you're using Company Investment method, the Process Interest and Payment process sets the status to *Paid* when the payment is processed. If you have any other investment method, you must set the status to *Paid* manually when the payment is processed.

Error: Indicates that the Process Interest and Payment process could not process the payment.

Request Payment: Indicates that the funds are waiting to be processed.

Transfer to Account: Indicates that funds are due to be transferred to an external organization. Once the transfer is complete, you need to set the status to *Posted to Account* to track the funds.

Interest Payment Details

This group box appears for profit-sharing agreements with the *Company Investment* method selected. These amounts are calculated by the Process Interest and Payment process.

From Date, Thru Date	The dates defining the period for which interest has been calculated. Interest is calculated yearly during the period when funds are unavailable.
Interest Gross Amount	The interest due on the global fund before deductions are taken.
Deductions on Interest	The deductions on the interest.
Interest Net Amount	The interest payable to the employee after deductions are made.
Payment/Reinvestment Date	Depending on the interest status, this field shows one of three dates: the date that the employee is due to receive the interest payment, the date on which the payment was made, or the date on which the interest is reinvested.
Status	Interest status. This is one of the following values: <i>Canceled</i>: Cancels the interest. Use this status when you find an error in an employee's interest after running the Distribute Global Fund process. To correct such a problem, you cannot run the process again or delete the employee data. Instead, set the interest status to <i>Canceled</i> and insert a new row for the employee with the correct amount. <i>Entitled</i>: Indicates that the interest has been calculated and is available. <i>Reinvested</i>: Indicates that interest has been added to the global funds and isn't paid immediately to the employee. <i>Manual</i>: Use this status when you enter the interest amount manually. <i>Sent to Payroll</i>: Indicates that the Process Interest and Payment process has run and the interest payment has been sent to PeopleSoft Global Payroll for France. <i>Paid</i>: Indicates that the interest payment has been processed by your payroll system. The Process Interest and Payment process sets the status to <i>Paid</i> when the interest payment is processed. <i>Error</i>: Indicates that the Process Interest and Payment process could not process the interest payment.
Option	Displays the interest re-investment method selected. This is either the default method for the agreement or the method selected by the employee. You can override the value.

Reporting Profit Sharing

Compensation administrators are responsible for providing all eligible employees with details of their profit sharing amount when these are calculated, or when an employee leaves the organization.

The Individual Profit Sharing report provides all the necessary information for individual employees. This is the same information that the employee can access online using the Request Fund Release option.

PeopleSoft also provide the Agreement Profit Sharing report for administrators. This report lists all the employees that are eligible for a selected agreement, or all eligible employees with the same fund status. This is a useful way to generate a list of employees who have requested a fund release, employees who are in error, or employees whose funds are to be transferred. The Agreement Profit Sharing report includes the following for each employee:

- Status of the employees funds.
- Gross and net profit sharing amount.
- Deductions.
- Investment method.

You can only run these reports if the status of the reference period is set to *Computed*, which means that the Compute Global Fund and the Distribute Global Fund processes have been run.

See Also

[Chapter 6, “Profit Sharing for Employees,” Viewing Personal Entitlements and Requesting Fund Release, page 66](#)

Common Elements Used in this Section

Agreement ID	Select the agreement on which you want to report.
Reference ID	Select the reference period for the report.
Employee ID	Select the employee you want to report on or leave blank to run the report for all eligible employees.

Pages Used to Run the Profit Sharing Reports

Page Name	Object Name	Navigation	Usage
Individual Report	RUNCTL_WP_IND_RPT	Compensation, Profit Sharing FRA, Manage Profit Sharing, Individual Report, Individual Report	Use this page to run the Individual Profit Sharing Report (WP0001FR). This report is delivered each year to employees to inform them of their entitlements.
Agreement Report	RUNCTL_WP_AGRT_RPT	Compensation, Profit Sharing FRA, Manage Profit Sharing, Agreement Report, Agreement Report	Use this page to run the Agreement Profit Sharing Report (WP0002FR).

Running Profit Sharing Reports

Access the Agreement Report page.

Agreement Report

Run Control ID: FL [Report Manager](#) [Process Monitor](#) Run

Process List

Customize | Find | View All First 1 of 1 Last

	*Agreement ID	*Reference Period	Fund Status	EmplID	Name		
1	KF1	2001	Request			+	-

Agreement Report page

Fund Status

If you want to run the report for funds of a certain status, select the status from the available values. Otherwise, leave this field blank to include funds of all statuses.

CHAPTER 6

Profit Sharing for Employees

This chapter explains the options provided for employees to:

- View and personalize agreement settings.
- View personal entitlements and request fund release.

Understanding Employee Options

Employees access and update agreement information online in two ways:

- Using the Review Agreement, Agreement Personalization, and Personal Entitlement components available in the PeopleSoft Human Resources: Manage French Profit Sharing business process.
- Using self-service transactions provided with PeopleSoft eCompensation.

Note. Employees can access their own profit-sharing information only using the employees options. Therefore, a compensation administrator using these options would only see his or her profit-sharing information.

This chapter describes these two employee options available in the Profit Sharing business process:

- Agreement Personalization

Employees use this component to view agreement information and change agreement settings. This option is only available when the agreement has an *Approved* status.

- Personal Entitlement

Employees use this component to view their fund information once the funds have been calculated and the reference period status is *Approved*. For profit-sharing agreements, employees also use the component to request release of part or all of the funds. For worker's participation agreements, funds are available at the end of the reference period and not subject to a period of unavailability.

Note. The Review Agreement component gives employees a display-only view of the agreement definition. The pages are the same as those used by the administrator for setting up the agreement.

See Also

PeopleSoft 8.8 eCompensation PeopleBook, “French Profit Sharing Self-Service Transactions”

Chapter 3, “Setting Up Profit Sharing,” Defining Agreements, page 18

Personalizing Agreements

This section explains how employees view and update agreement settings.

Pages Used to Personalize Agreements

Page Name	Object Name	Navigation	Usage
Inquire and Customize	WP_AGRT_CUST_TBL	Compensation, Profit Sharing FRA, Manage Profit Sharing, Agreement Personalization, Inquire and Customize	View details of the agreement information that is defined on the Define Agreement - Agreement page. Employees can also view the agreement document from this page.
Global Fund	WP_PERIOD_CUST_TBL	Compensation, Profit Sharing FRA, Manage Profit Sharing, Agreement Personalization, Global Fund	View the reference periods defined for the agreement and the status of each period. Employees can also view the global funding formula defined for each reference period.
Formula View	WP_FORMULA_VW2_SEC	Click the View Formula button on the Global Fund page.	View a description of the formula that calculates the global fund amount. This formula is specified in the Funding Formula field on the Define Agreement - Computation page. To make it easier for employees to understand, the system displays the comments specified for the formula and not the actual formula. These comments are entered on the Formula Comments page.
Investment	WP_INVEST_CUST_TBL	Compensation, Profit Sharing FRA, Manage Profit Sharing, Agreement Personalization, Investment	View the investment methods defined for the agreement. If multiple investment methods are defined, employees can select a method for their share of the global fund.
Interest	WP_INTRST_CUST_TBL	Compensation, Profit Sharing FRA, Manage Profit Sharing, Agreement Personalization, Interest	View interest information calculated by the Process Interest and Payment process and select whether to re-invest the interest or receive it. This page is available for profit-sharing agreements with the Company Investment method selected only. Interest is not calculated for other types of agreement.

Viewing Reference Period Information

Access the Global Fund page.

Inquire & Customize		Global Fund	Investment	Interest
Employee ID:	KF0001	Berger,Maurice	Empl Rcd#:	0
Agreement:	KF1	Profit Sharing Agreement for Company KF1		

Reference Periods						Customize	Find	View All		First	1 of 1	Last
Period	From Date	Thru Date	Status	Status Date	Global Fund							
2001	01/01/2001	31/12/2001	Approved	06/11/2002	55,174.52		EUR	View Formula				

Global Fund page

This page lists the reference periods that were defined for the agreement using the Reference Period page. Employees can't update any fields on the page.

Global Fund

Displays the global fund amount, which is calculated by the Compute Global Fund and Distribute Global Fund process, using the formulas and distribution methods defined on the Define Agreement pages.

The system populates this field only when the reference period status is *Approved*.

View Formula

Click to view the formula for calculating the global fund. The system displays the comments specified for the formula on the Formula Comments page.

Personalizing Investment Information

Access the Investment page.

Inquire & Customize		Global Fund	Investment	Interest
Employee ID:	KF0001	Berger,Maurice	Empl Rcd#:	0
Agreement:	KF1	Profit Sharing Agreement for Company KF1		

Agreement Investments			Customize	Find	View All		First	1-3 of 3	Last
	Investment Method								
1	Profit sharing invests in the company's stocks	Details							
2	Profit sharing invests in the company	Details							
3	Profit sharing invests in the company's PEE	Details							

Customize Investment		Customize	Find	View All		First	1 of 1	Last
Period	*Investment Method							
2001	Profit sharing invests in the company							

Investment page

Agreement Investments

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

- Details** Click to view details of the Investment Method. The information displayed varies according to the investment type.
- Default** Indicates the default investment method. This is how an employee's funds are invested, unless the employee selects another investment method.

Customize Investment

Employees use this group box to override the default investment method for their fund for a selected reference period.

- Investment Method** Employees select from any of the alternative investment methods that are defined for the agreement. They can't change the investment method after the first payment is made or after the personalization date defined for the reference period.
- Employees who are leaving the organization, select *Transfer to new comp/fin orga.* to identify the organization to which the funds are transferred. The Details button appears when the employee selects this investment method.
- Details** Employees click this button to display the investment details page. Employees who are leaving the organization use this page to enter the name and address of the new company to which funds will be transferred.

See Also

[Chapter 3, "Setting Up Profit Sharing," Setting Up Reference Periods, page 28](#)

[Chapter 5, "Reviewing and Reporting Employee Profit Sharing Information," Reviewing Member Information and Processing Fund Release Requests, page 49](#)

Personalizing Interest Information

Access the Interest page.

Inquire & Customize Global Fund Investment Interest			
Employee ID:	KF0001	Berger,Maurice	Empl Rcd#: 0
Agreement:	KF1	Profit Sharing Agreement for Company KF1	
Agreement Re-Investment Option			
Immediate			
Customize Re-Investment Option			
		Customize Find View All	First 1 of 1 Last
Period	*Interest Re-Investment Option		
2001	Immediate		

Interest page

Note. This page is displayed only for profit-sharing agreement types with Company Investment selected as the investment method.

Agreement Re-Investment Option Displays the interest re-investment option selected on the Define Agreement - Investment page. This is how the system handles interest payments, unless the employee changes the default.

Customize Re-Investment Option

Employees use this group box to override the re-investment option defined for the agreement for each reference period. Employees cannot change the re-investment option once interest has been paid for a given reference period, or after the personalization date defined for the reference period.

See Also

Chapter 3, “Setting Up Profit Sharing,” Defining Investment Methods, page 24

Viewing Personal Entitlements and Requesting Fund Release

This section explains how employees can view details of their funds and request release of profit sharing funds. For worker’s participation agreements, employees don’t need to request fund release because funds are automatically paid as soon as they are available.

For profit-sharing agreements, employees can normally only release funds after the end of the unavailability period. However, in certain situations, employees can request early release of funds by specifying the reason for the early release. If you have enabled workflow, when employees submit fund release requests workflow triggers an email to the compensation administrator to inform the administrator that a new request is waiting for approval.

See Also

Chapter 3, “Setting Up Profit Sharing,” Defining Investment Methods, page 24

Prerequisites

Employees can only view their funds when the following criteria are met:

- The administrator has run the profit sharing processes for the reference period.
- The reference period status is *Approved*.

Pages Used to Request Fund Release

Page Name	Object Name	Navigation	Usage
Profit-Sharing Inquire	WP_FUND_RLS_TBL	Compensation, Profit Sharing FRA, Manage Profit Sharing, Personal Entitlements, Profit Sharing Inquire	Employees view details of their funds, including gross and net amounts, payment status, and information about the average fund amounts.
Fund Request Details	WP_FUND_EVNT_SEC	Click the Request button on the Profit—Sharing Inquire page.	Request release of profit-sharing amount. This page is only available if employees are associated with profit-sharing agreements. For worker's participation agreements, funds are available at the end of the reference period.
Interest Inquire	WP_FUND_INTRST_TBL	Compensation, Profit Sharing FRA, Manage Profit Sharing, Personal Entitlements, Interest Inquire	View details of interest payments calculated by the Process Interest and Payment process. This page is only available if employees are associated with profit-sharing agreements with <i>Company Investment</i> selected as the investment method. Interest is not paid for worker's participation agreements.

Viewing Profit Sharing Amounts

Access the Profit-Sharing Inquire page.

Profit-Sharing Inquire		Interest Inquire	
Employee ID:	KF0001	Berger,Maurice	Empl Rcd#: 0
Agreement ID:	KF1	Profit Sharing Agreement for Company KF1	
Reference Period:	2001	Request	
Profit-Sharing Details			
Customize Find View All First 1 of 1 Last			
Seq	Profit-Sharing Gross Amount	Profit-Sharing Deductions	Profit-Sharing Net Amount
1	426.51	32.41	394.10
			EUR
			Entitled
			01/04/2007
Global Fund Amount:		55174.52	EUR
Average Total Gross Amount:		1313.68	EUR
Total Gross Amount:		426.51	EUR
Total Net Amount:		394.10	EUR
Go To: Agreement Personalization			

Profit-Sharing Inquire page

This page displays the employee's profit sharing amount as calculated by the Compute Global Fund and Distribute Global Fund processes.

Request

Click to access the fund release page where the employee specifies the reason for fund release and the amount to be released.

Profit-Sharing Details

Profit-Sharing Gross Amount

The employee's profit-sharing amount calculated by the Distribute Global Fund process.

Profit-Sharing Deductions

Displays the deductions due on the profit sharing amount.

Profit-Sharing Net Amount

The amount payable after deductions are made.

Status

Status of the employee's fund is one of these values:

Entitled: Indicates that the profit share amount has been calculated but the money is unavailable. This status applies to profit-sharing agreement types only.

Available: Indicates that the profit share amount can be released. For worker's participation agreements, the fund is available as soon as it is calculated. For profit-sharing agreements, funds are available after the end of the unavailability period defined for the agreement.

Canceled: Indicates that the compensation administrator canceled the profit-sharing amount.

Sent to Payroll: Indicates that the Process Interest and Payment process has run and the profit-sharing amount has been sent to Global Payroll for France.

Posted to Account: Indicates that the funds have been transferred to an external financial organization.

Paid: Indicates that the payment has been processed by your payroll system.

Error: Indicates that the Process Interest and Payment process could not process the payment.

Request Payment: Indicates that the employee submitted a fund release request. The compensation administrator must approve this request before the payment is processed.

Transfer to Account: Indicates that the funds are waiting for transfer to an external financial organization.

Availability/Payment Date	Date that the employee is due to receive payment or the date on which the payment was made. The payment date is calculated by the Process Interest and Payment process.
Global Fund Amount	The total fund for all eligible employees.
Average Total Gross Amount	Displays the average gross amount for all employees in the agreement.
Total Gross Amount	Displays the total of the amounts in the Profit Sharing Gross Amount column.
Total Net Amount	Displays the total of the amounts in the Profit Sharing Net Amount column.
Agreement Personalization	Click to display the Agreement Personalization page where the employee can view and personalize agreement details.

Submitting a Fund Release Request

Access the Fund Release Details page.

Fund Request Details

Employee ID:	KF0001	Berger,Maurice	Empl Rcd#:	0
Agreement ID:	KF1	Profit Sharing Agreement for Company KF1		
Reference Period:	2001			
Total Gross Amount:	426.51		EUR	
Total Net Amount:	394.10		EUR	
Available/Entitled Amount:	394.10		EUR	

Fund Release

Find | View All First 1 of 1 Last

Sequence: 1 Request Status: New

Trigger Event Information

Event Date: 06/11/2002

Release Event: Other Release Date: 06/11/2002

Release Request

☒ Total Release

☐ Amount

OK Cancel Refresh

Fund Request Details page

Employees use this page to request fund release in the following situations:

- Before the end of the unavailability period. Employees can request early release of funds in certain situations. They use this page to specify the event that enables them to request fund release.
- After the end of the unavailability period. Normally profit-sharing funds are unavailable for a defined period that is set up in the agreement. At the end of this period, the fund status is changed to *Available* and employees can request release.

Requests are submitted to the compensation administrator for approval. Employees receive an email when the administrator approves or rejects the request.

Available/Entitled Amount Displays the maximum amount that the employee can request. This does not include any interest payments to which the employee may be entitled.

Note. A total release includes any interest payments to which the employee is entitled.

Trigger Event Information

Release Event Employees who are requesting early fund release, select the event that enables them to release funds and enter the date in Event Date.

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Employees who are leaving the organization, select *Termination*. If the funds are available, employees select *Available*.

Release Request

Total Release

Employees select this option if they want to release the whole fund for the reference period. If the employee is entitled to an interest payment, this is included if the employee requests a total release.

Amount

Employees select this option to specify the amount they want released. They enter the amount and currency in the fields provided.

Viewing Interest Information

Access the Interest Inquire page.

Profit-Sharing Inquire
Interest Inquire

Employee ID: KF0001 Berger,Maurice Empl Rcd#: 0
Agreement ID: KF1 Profit Sharing Agreement for Company KF1
Reference Period: 2001

Interest Details								Customize	Find	View All	First	1 of 1	Last
From Date	Thru Date	Interest Gross Amount	Deductions on Interests	Interest Net Amount		Status	Payment/Re-Investment Date	*Option					
01/04/2002	05/11/2002	11.82		0.00	EUR	Entitled	01/04/2003	Immediate					

Total Net Amount: 394.10 EUR
Total Interest Gross Amount: 11.82 EUR
Total Interest Net Amount: 0.00 EUR

Interest Inquire page

This page appears only if the Company Investment method was selected for the agreement.

Interest Details

From Date, Thru Date

The dates defining the period for which interest has been calculated. Interest is calculated yearly during the period when funds are unavailable.

Interest Gross Amount

The interest calculated by the Process Interest and Payment process.

Deductions on Interests

Displays the deductions due on the interest payment.

Interest Net Amount

The interest payable after deductions are made.

Status

Interest status. Values are:

Canceled: Cancels the interest. Compensation administrators use this status if there is an error in an employee's interest after running the distribute global fund process.

Entitled: Indicates that the interest has been calculated and is available.

Reinvested: Indicates that interest has been added to the global funds and isn't paid immediately to the employee.

Manual: Indicates that the interest amount was entered manually by the administrator.

Sent to Payroll: Indicates that the Process Interest and Payment process has run and the interest payment has been sent to your payroll system.

Paid: Indicates that the interest payment has been processed by your payroll system. If you have Global Payroll for France installed and you're using Company Investment method, the Process Interest and Payment process sets the status to *Paid* when the interest payment is processed.

Error: Indicates that the Process Interest and Payment process could not process the interest payment.

**Payment/Re-Investment
Date**

Date that the employee is due to receive the interest payment or the date on which the interest is reinvested.

Option

Displays the interest re-investment method selected. This is either the default for the agreement or the re-investment method that the employee selected on the Agreement Personalization - Interest page. Values are:

Immediate: Interest is paid at the end of the calculation period.

Re-invest: Interest is added to the global fund.

Total Net Amount

Displays the total net amount for all reference periods, as shown on the Profit-Share Inquire page.

**Total Interest Gross
Amount**

Displays the total of the amounts in the Interest Gross Amount column.

Total Interest Net Amount

Displays the total of the amounts in the Interest Net Amount column.

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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