PeopleSoft®

# PeopleSoft 8.8
# Human Resources PeopleBook: Administer Compensation

**December 2002**

PeopleSoft 8.8
Human Resources PeopleBook:
Administer Compensation
SKU HRMS88HAC-B 1202

# Contents

# 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.

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**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.

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## 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. |
| *Italics* | 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.<br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter *O*. |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press 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.<br><br>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.<br><br>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:<br><br>(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 *See.* 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.

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**Note.** Example of a note.

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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 Administer Compensation Preface

This preface discusses:

- PeopleSoft application fundamentals
- PeopleBook structure

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**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.

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## PeopleSoft Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Administer Compensation* provides you with implementation and processing information for your PeopleSoft Human Resources Administer Compensation 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 products 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:<br>• How to use the Application Fundamentals book.<br>• How PeopleBooks are structured. |

| Chapters | Description |
|---|---|
| Getting Started With… | This chapter discusses product implementation guidelines. It explains:<br>• The business processes documented within the book.<br>• Integrations between the product and other products.<br>• 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 product. |
| Setup and Implementation | This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. 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.<br>**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. |
| 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.<br>**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. |

| Chapters | Description |
| --- | --- |
| 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 Administer Compensation

This chapter provides an overview of PeopleSoft Human Resources Administer Compensation business processes and discusses PeopleSoft Human Resources Administer Compensation implementation tasks.

## Administer Compensation Business Processes

PeopleSoft Human Resources Administer Compensation provides the following business processes:

- Administering Seniority Pay.
- Defining Rules-Driven Component Defaulting.
- Refreshing Employee Compensation.

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

## Implementing PeopleSoft Human Resources Administer Compensation

The Administer Compensation table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Core Administer Compensation application 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 Administer Compensation may vary; each individual application isn't necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the Administer Compensation core application, then several tables specific to the country or industry you operate in, followed by additional Administer Compensation 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

The Administer Compensation business process 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 Administer Compensation business process setup.

| Step | Reference |
|---|---|
| 1. Set up PeopleSoft HRMS fundamental tables. | *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook* |
| 2. Set up PeopleSoft Human Resources fundamental tables. | *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Getting Started With PeopleSoft HRMS" |

## Setting Up Core PeopleSoft Human Resources Administer Compensation Tables

The steps discussed in this section suggest an order in which you define the information in your core Administer Compensation tables. The information that you defined in your fundamental tables lays the foundation for this setup.

Setting up these core tables prepares your system to support these business processes:

- Managing rate codes, rate classes, and rate code groups.
- Defining compensation rates.

| Step | Reference |
|---|---|
| 1. Define rate codes and rate code groups. | Chapter 3, "Setting Up Administer Compensation," page 7 |
| 2. Define compensation rates. | Chapter 4, "Defining Compensation Rates and Rules-Driven Component Defaulting," page 15 |
| 3. Define component defaulting rules. | Chapter 4, "Defining Compensation Rates and Rules-Driven Component Defaulting," page 15 |

# CHAPTER 2

# Understanding PeopleSoft Human Resources Administer Compensation

This chapter provides an overview of PeopleSoft Human Resources Administer Compensation, lists common elements, and discusses:

- Business processes supported by PeopleSoft Human Resources Administer Compensation.
- PeopleSoft Human Resources Administer Compensation integrations.

## PeopleSoft Human Resources Administer Compensation

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

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

With Administer Compensation, you can:

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

## Common Elements in This PeopleBook

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

**Base Pay** Pay for a regularly assigned workweek. A pay component that is included in the job comp (job compensation) rate calculation. For example, you can set up a regular hourly rate, plus a shift rate, a union-negotiated rate for hazardous work, and so on.

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

| | |
|---|---|
| **Job Code** | An ID for a job as defined on the Job Code table. |
| **Job Code Components** | The pay components assigned to a job code by associating rate codes with job codes on the Default Compensation page or the Non-Base Compensation page of the Job Code Table. |
| **Job Compensation Rate** | The compensation rate of the corresponding job row. |
| **Non-Base Pay** | A pay component that is not included in the job comp rate calculation. It is used by payroll only in the paysheet calculation. For example, non-base pay can be set up for additional work, holiday pay, bonuses, and so on. |
| **Pay Components** | Rows in the compensation record that build the compensation packages in that record. |
| **Rate Code** | IDs for pay components. Rate codes define rates of pay and are set up in the Comp Rate Code (compensation rate code) Table. Rate codes represent pay components in pages and when configuring compensation packages in the compensation record. |
| **Rate Code Group** | A rate code group is a number of pay components (represented by rate codes) that are bundled into a subset of a compensation package. The rate code group is used to calculate percentage-based components that do not apply the percentage to all pay components in the compensation package. Rate code groups are constructed on the Rate Code Groups page. |
| **Rate Code Type** | Defines how the monetary value of the rate code is calculated. The compensation rate code type is defined on the Comp Rate Code Table. Valid values are Flat Amount, Hourly Rate + Flat Amount, Hourly Rate, Percent, and Points. |
| **Rules Driven Pay Components** | Pay components that operate using a rule set up on the Comp Rate Code Rules component to determine the appropriate rate code to assign to an employee. |
| **Salary Step Components** | Pay components that are assigned to a salary step by entering the corresponding rate codes on the Salary Step Components page. |
| **Seniority Pay** | A premium that is paid for the length of time that an employee works for an organization. |
| **Seniority Pay Components** | Pay components for which rate codes are assigned to the seniority rate code class SENPAY (provided by PeopleSoft) on the Comp Rate Code Table page, enabling you to access the seniority pay functionality. |
| **Seniority Rate Codes** | Rate codes that are associated with the seniority rate code class SENPAY (provided by PeopleSoft) on the Comp Rate Code Table page. Levels of pay increase are set up for these codes on the Seniority Pay page of the Comp Rate Code component. |

## PeopleSoft Human Resources Administer Compensation Business Processes

PeopleSoft Human Resources Administer Compensation supports the following business processes:

- Administering Seniority Pay

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

- Defining Rules-Driven Component Defaulting

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

- Refreshing Employee Compensation

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

### See Also

Chapter 5, "Administering Seniority Pay," page 23

Chapter 4, "Defining Compensation Rates and Rules-Driven Component Defaulting," page 15

Chapter 6, "Refreshing Employee Compensation Information," page 29

## PeopleSoft Human Resources Administer Compensation Integrations

PeopleSoft Human Resources integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

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

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

- PeopleSoft Human Resources Administer Workforce.
- PeopleSoft Human Resources Plan Salaries.
- PeopleSoft Human Resources Manage Positions.

We discuss integration considerations in this PeopleBook.

### See Also

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Understanding Enterprise Integration Points in HRMS"

# Administering Compensation

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

To administer compensation:

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

### See Also

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Installing PeopleSoft HRMS,” Selecting HRMS Options

*PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries*, “Setting Up Plan Salaries,” Associating Salary Components With Salary Steps

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Jobs,” Classifying Jobs

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, “Hiring Your Workforce,” Entering Employee Compensation Information

*PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions*, “Setting Up Positions,” Creating Positions

# CHAPTER 3

# Setting Up Administer Compensation

This chapter discusses how to:

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

## Setting Up Rate Codes

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

This section provides an overview of rate codes and discusses how to:

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

### Seniority Rate Codes

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

To create seniority rate codes:

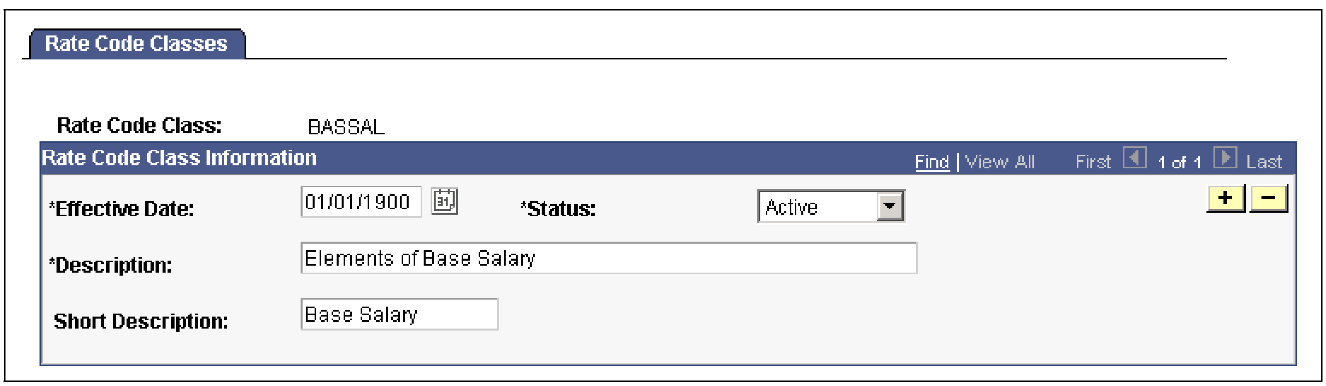
1. Associate a rate code with the predefined seniority rate code class SENPAY.
2. Associate the rate code with levels of seniority compensation increase.
3. Associate the rate code with one or more groups that you define using Group Build (optional).

# Pages Used to Set Up Rate Codes

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Rate Code Classes | RATECD_CLASS_TBL | Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Class Table | Create rate code classes. |
| Comp Rate Code Table (compensation rate code table) | COMP_RATECD_TBL | Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Comp Rate Code Table | Define rate codes. |
| Comp Rate Code Table - Seniority Pay | SENIORITY_PAY | Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Seniority Pay | Associate a seniority rate code with levels of compensation increases and with one or more groups that you define using the Group Build business process. |
| Combination Rules | COMP_RATECD_RULES | Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Combination Rules | View defaulting rules associated with a compensation rate code. |

# Creating Rate Code Classes

Access the Rate Code Classes page.



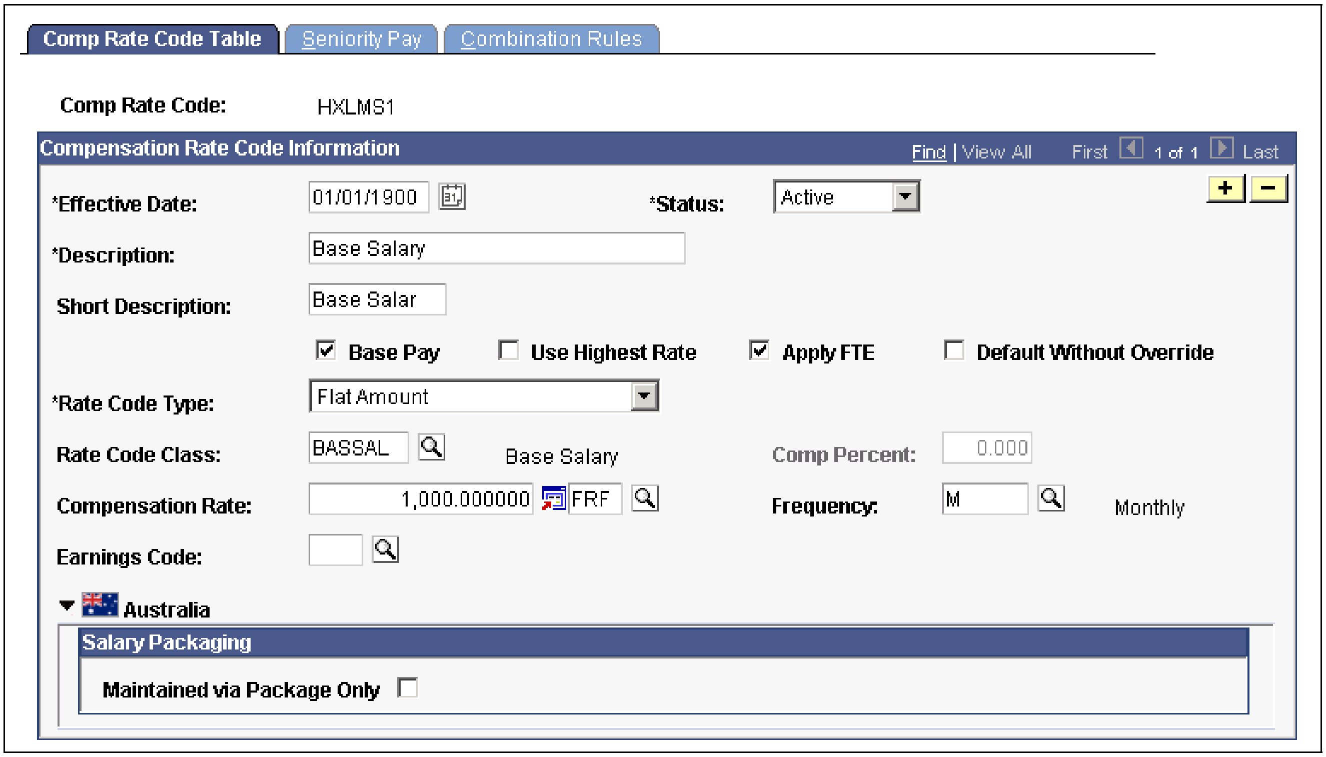

Rate Code Classes page

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

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

# Defining Rate Codes

Access the Comp Rate Code Table page.




Comp Rate Code Table page

**Use Highest Rate**

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

For Payroll for North America: When you assign rate codes at the job level, you can enter compensation rates that differ from the rate defined for the rate code. If you clear this check box, the rate that you specify at the job level overrides this rate.

**Apply FTE** (apply full-time equivalency)

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

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

**Default Without Override**

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

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**Note.** We do not recommend clearing this check box for rate codes used as absorbable premiums on the Salary Plan Table once the rate code has been added to employee compensation packages.

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**Rate Code Type**

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

- *Flat Amount:* A flat (or fixed) amount.
- *Hourly Rate + Flat Amount:* A flat amount that is paid in addition to the hourly rate that is specified on the worker's timesheet. Enter the flat amount in the Compensation Rate field. This type cannot be a base-pay component.
- *Hourly Rate:* An hourly rate of pay.
- *Percent:* A percentage figure for use in defining compensation.
- *Points:* Salary points that are paid for a job. Set up the point's monetary value on the Company Table page. You associate point value (an integer) with rate codes whenever you define rates of pay using comp rate codes.

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

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See *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Installing PeopleSoft HRMS," Setting Up Implementation Defaults.

**Rate Code Class**

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

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

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

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**Comp Percent** (compensation percentage)

Enter the percent to use as a percentage calculation for all base pay components or a percentage of a rate code group where the rate code group contains one or more base pay components.

**Compensation Rate**

Select a compensation rate and currency.

**Frequency**

The rate code type Flat Amount cannot have a frequency of Hourly. The rate types Flat Amount & Hourly and Hourly *must* have a frequency of Hourly.

**Earnings Code**

Earnings codes define the way that earnings are calculated and taxed. You establish earnings codes on the Job Earnings Distribution page.

### Australia

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

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

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

If you select this check box, a warning message appears if you manually change an employee's compensation rate codes.

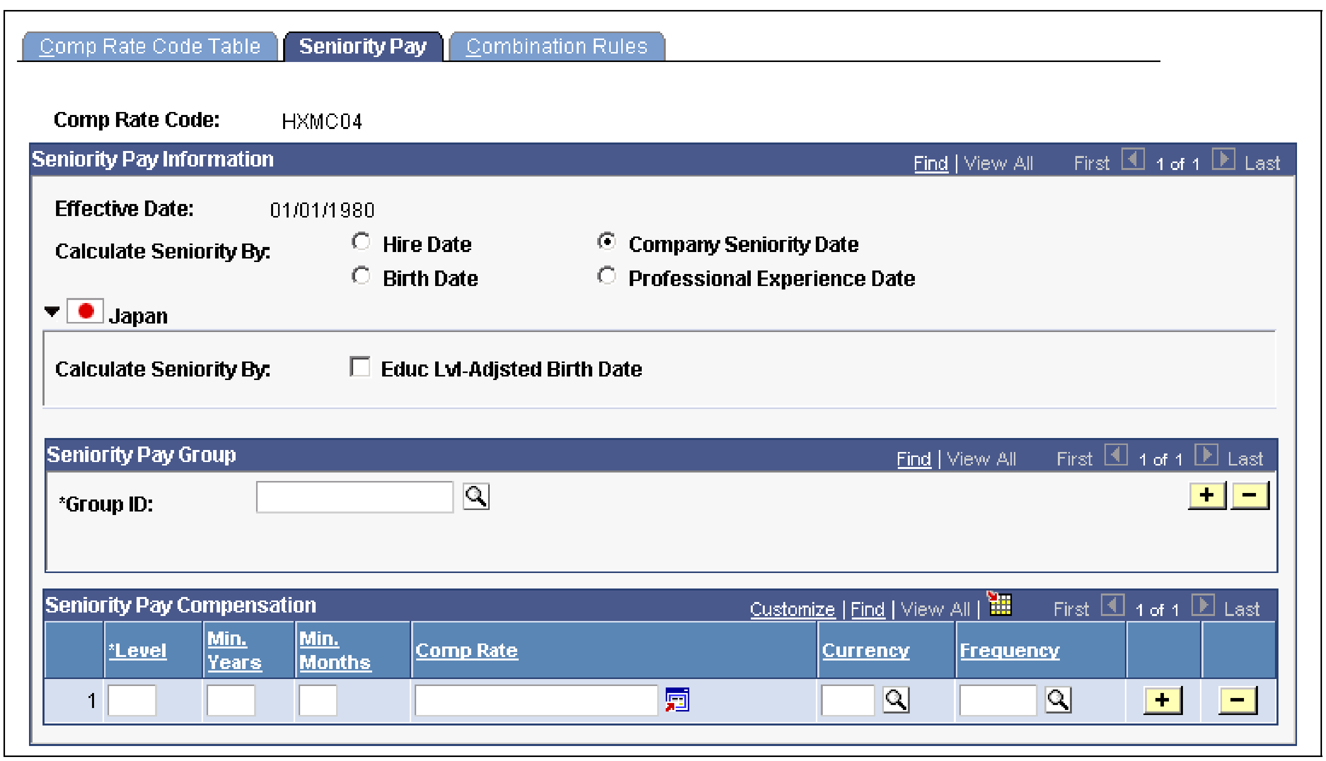
This check box, combined with other information on the employee's Job record, works to maintain salary package integrity.

### See Also

*PeopleSoft Human Resources PeopleBook: Administer Salary Packaging*

## Associating Seniority Rate Codes With Compensation Increases

Access the Comp Rate Code Table - Seniority Pay page.




Comp Rate Code Table - Seniority Pay page

**Calculate Seniority By** Select the type of date on which to base seniority. Values are:

- *Hire Date.*
- *Company Seniority Date:* This date tracks the amount of time that an employee has been with a particular company in the organization. The default date is the hire date, but you can override it.
- *Birth Date.*
- *Professional Experience Date:* The date that the employee began working in a job requiring the skills that are directly related to the current position.

### (JPN) Japan

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

### Seniority Pay Group

**Group ID**
Enter one or multiple group IDs to associate the seniority rate code with groups that you define using the Group Build business process. The system issues a warning if the ID that you enter is associated with another seniority rate code. When you move out of this field, the name of the group ID appears.

**Note.** If you do not enter a group ID, the system associates the seniority rate code with every employee's compensation package.

### Seniority Pay Compensation

**Level**
Enter a seniority level.

**Min. Years** (minimum years) and **Min. Months** (minimum months)
Enter the minimum years and months of service that are necessary to qualify for the seniority level. If you enter both Min. Years and Min. Months, the system uses the total of those years and months in its calculation.

**Comp Rate** (compensation rate)
This option appear if you select Flat Amount, Hourly Rate, or Hourly Rate + Flat Amount as the rate code type. Enter a compensation rate to associate with this seniority level.

**Comp Percent** (compensation percent)
This option appear if you select Percent as the rate code type. Enter a percentage to associate with this seniority level.

**Points**
This option appear if you select Points as the rate code type. Enter a percentage to associate with this seniority level.

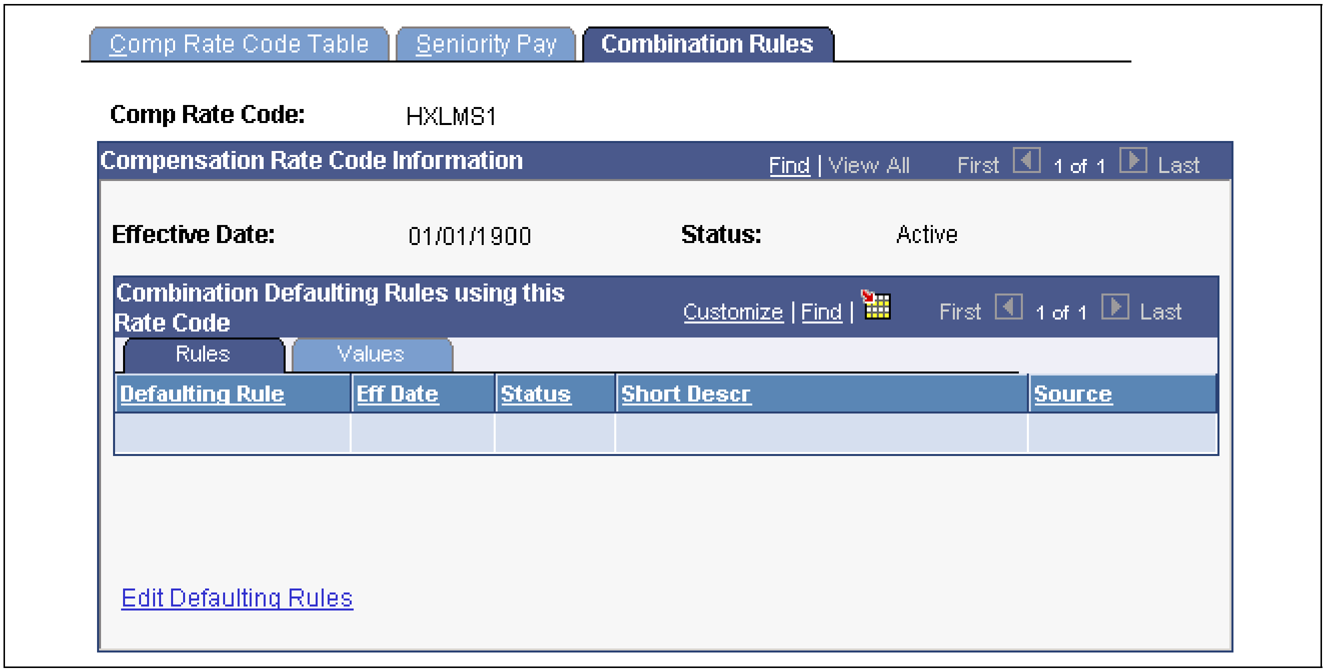
### See Also

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Setting Up Groups," Setting Up Group Definitions

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Setting Up Local Country Functionality," Setting Up the Education Level Age Table

## Viewing Defaulting Rules Associated With Compensation Rate Codes

Access the Combination Rules page.



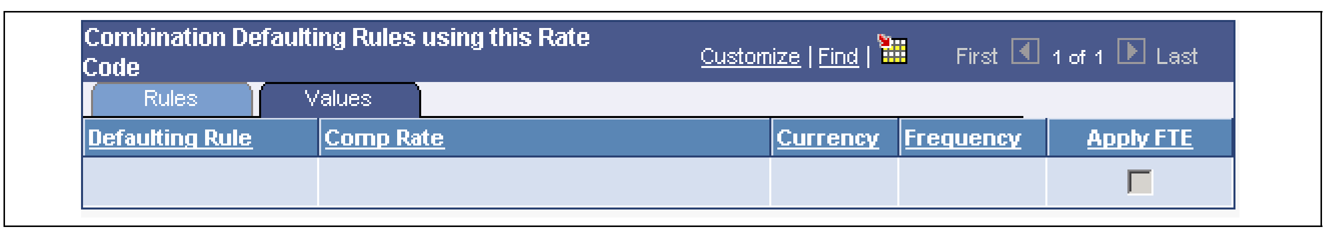

Combination Rules page

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

**Edit Defaulting Rules** Click to access the Rate Code Defaulting Rules - Rate Codes page and edit the defaulting rule information.

### Values Tab

Access the Values tab.




Combination Rules: Values page

View the compensation information to automatically populate the employee's compensation record for all combination defaulting rules associated with this rate code.

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

# Defining Groups of Rate Codes

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

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

  For example, an employee's base compensation package may be made up of a base-pay component, a cost of living component, child-care cost components, and commuting-cost components.

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

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

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

---

**Note.** Before you use groups of rate codes, you need to select the Rate Code Groups check box on HRMS Options page of the Installation component.

---

## Understanding Percentages and Rate Code Groups

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

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

  See *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Hiring Your Workforce," Entering Employee Compensation Information.

If you do so, the system applies a specific percentage to all the rates in the rate code group and adds the total to the employee's compensation package. Or you can calculate percentage rates using the employee's entire base-pay compensation package, and not use rate code groups at all.

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

## Page Used to Create Groups of Rate Codes

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

CHAPTER 4

# Defining Compensation Rates and Rules-Driven Component Defaulting

This chapter discusses how to:

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

## Understanding Rules-Driven Component Defaulting

You can create flexible defaulting rules for rate codes using rules-driven component defaulting.

To set up component defaulting rules:

1. Select the job data fields that affect compensation in your organization and that you want to have available for use in component defaulting rules on the Defaulting Options page.
2. Define component defaulting rules by indicating the field values that should result in a rate code change in an employee's compensation package in the Rate Code Defaulting Rules component.

For example, to set up a rule that would default compensation based on the salary plan and location of an employee, you select the Location and Salary Plan fields on the Defaulting Options page. On the Rate Code Defaulting Rules component, you define the rule and indicate which location and salary plan values trigger salary component defaulting and which new rate codes apply. After you have saved the rule and activated component defaulting in the Job Data component using the Default Components button, the system uses it to default the correct pay component (or pay components) into the employee's compensation package.

You can also use the Refresh Employee Compensation process to default the compensation packages of a defined employee group. The system updates the compensation record of any employee who meets the criteria established in the rule whenever you trigger the component defaulting process.

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

# Defining Compensation Rates for Workers

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

### Overview of Steps for Defining Rates of Pay

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

### See Also

*PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries*, “Setting Up Plan Salaries,” Associating Salary Components With Salary Steps

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Jobs,” Associating Salary Plan Information and Base Pay Rate Codes With a Job Code

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Setting Up Jobs,” Associating Non-Base Rate Codes With a Job Code

*PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions*, “Setting Up Positions,” Creating Positions

*PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, “Hiring Your Workforce”

# Defining Rules-Driven Component Defaulting

This section discusses how to:

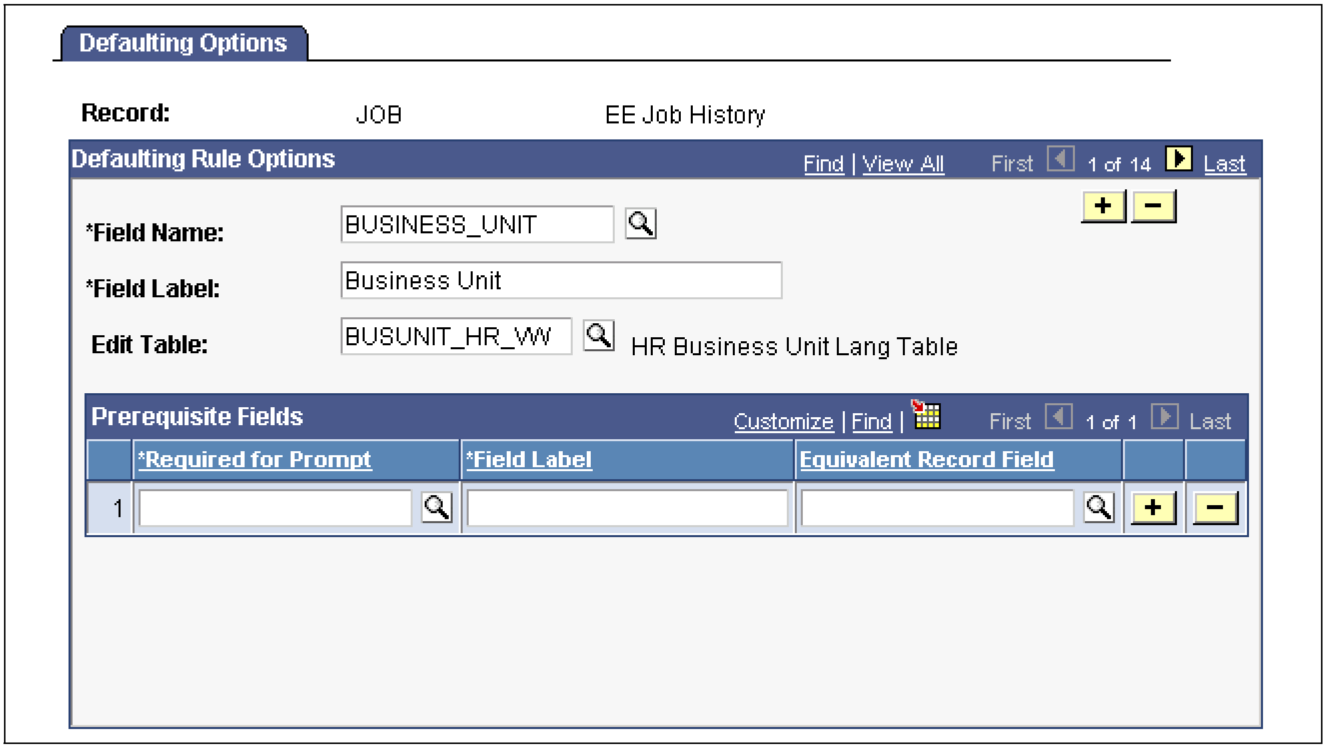
- Specify fields to use as component defaulting fields.
- Define component defaulting rules.
- Create component defaulting rules criteria.
- Associate values with component defaulting rules criteria.
- Assign rate codes to component defaulting rules.

## Pages Used to Define Rules-Driven Component Defaulting

| Page Name | Object Name | Navigation | Usage |
| --- | --- | --- | --- |
| Defaulting Options | CMP_DFLT_OPTIONS | Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Options | Specify which Job record fields are available to component defaulting rules. |
| Definition | CMP_RULE_DEFN | Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Definition | Define component defaulting rules. |
| Criteria | CMP_RULE_CRITERIA | Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Criteria | Create and modify criteria for component defaulting rules. |
| Values | CMP_RULE_VALUES | Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Values | Determine the selection values the fields and operators you selected on the Criteria page should act on. |
| Rate Codes | CMP_RULE_RATECD | Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Rate Codes | Assign rate codes to the component defaulting rules. |
| Comp Rate Code Secondary Panel (compensation rate code secondary panel) | COMP_RATECD6_SEC | Click Details on the Rate Codes page. | View additional information about the compensation rate code. |

## Specifying Fields to Use as Component Defaulting Rules

Access the Defaulting Options page.




Defaulting Options page

### Defaulting Rules Options

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

**Edit Table** — Select the field's edit table—the table from which the field is prompted.

### Prerequisite Fields

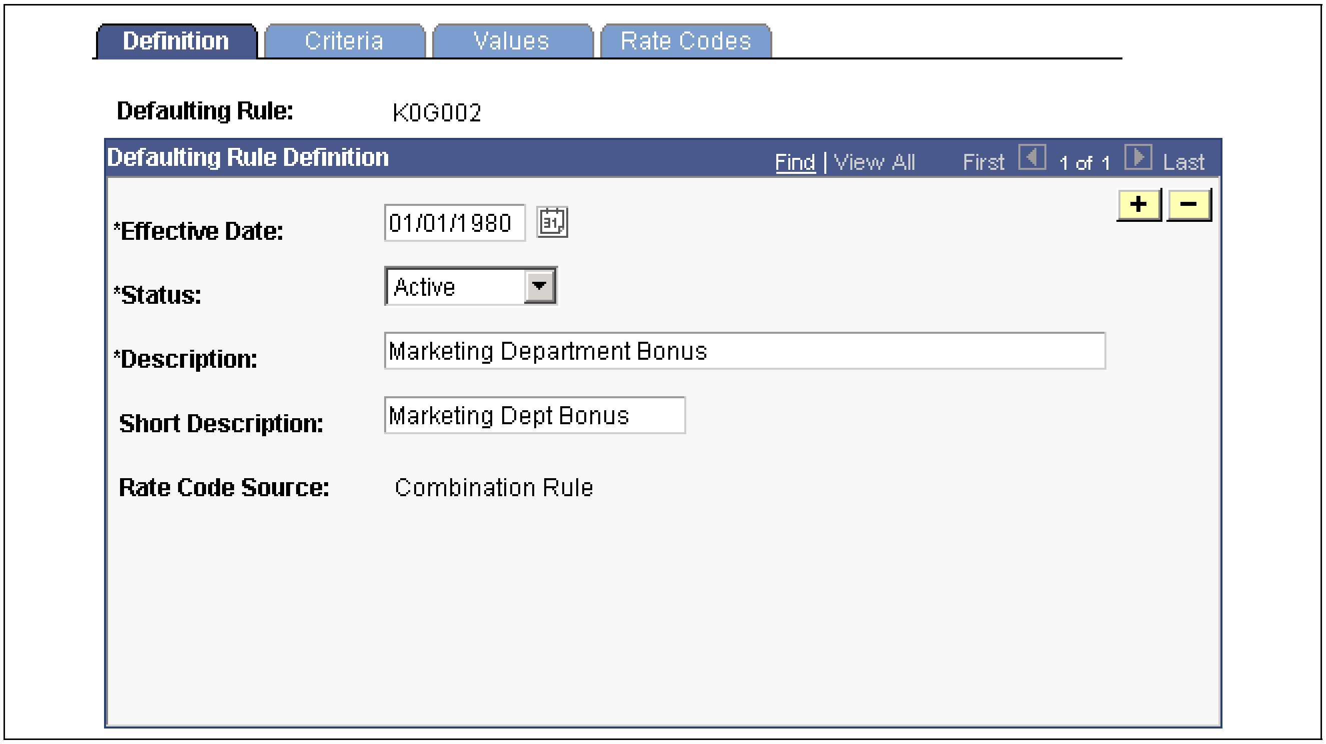
**Required for Prompt** and **Field Label** — Select the field that prompts for the defaulting rules fields, if required. For example, if the defaulting rules field is Department, select SETID because before you can select a department, you need to select the department's setID. The appropriate Field Label and Equivalent Record Field appear when you select the Required for Prompt field.

**Equivalent Record Field** — Select the Required for Prompt field's Job equivalent. For example, the Job equivalent of SETID is SETID_DEPT.

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

## Defining Component Defaulting Rules

Access the Definition page.

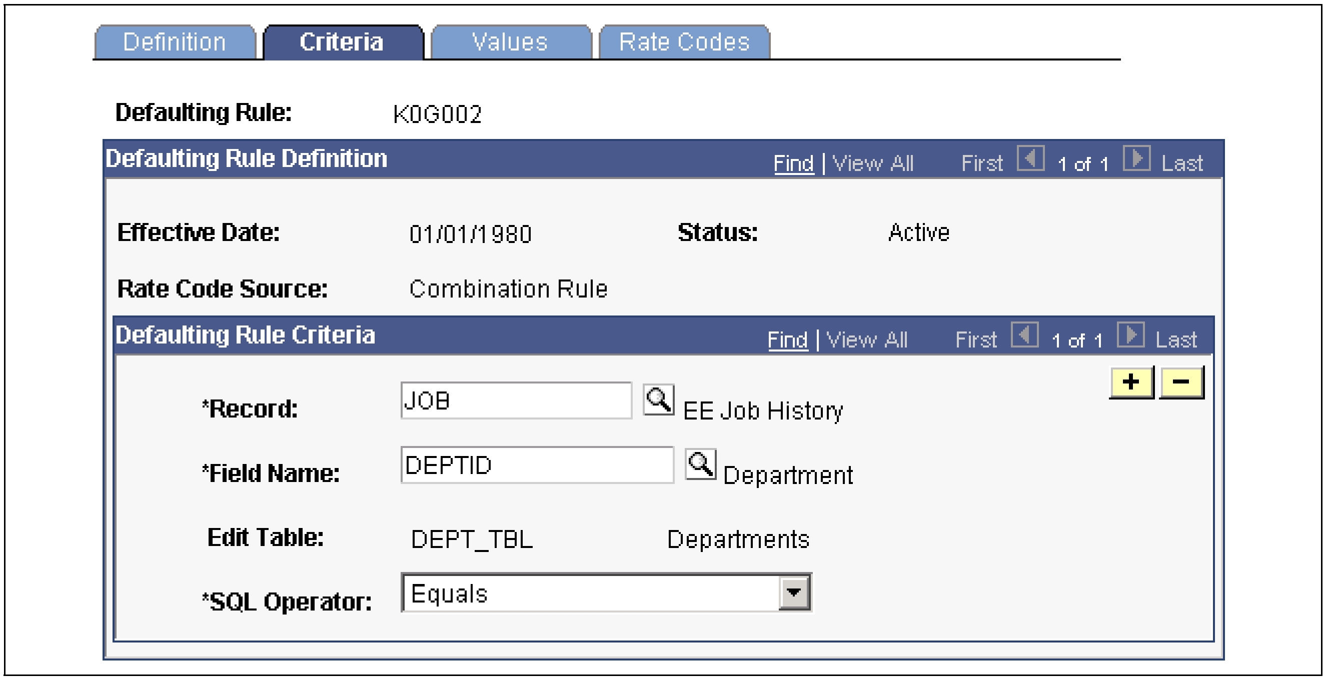



Definition page

Enter a description of the component defaulting rule. All new defaulting rules have a rate code source of *Combination Rule,* but you can view defaulting rules with alternate rate code sources, such as job code or salary step defaulting rules, here.

## Creating Component Defaulting Rules Criteria

Access the Criteria page.



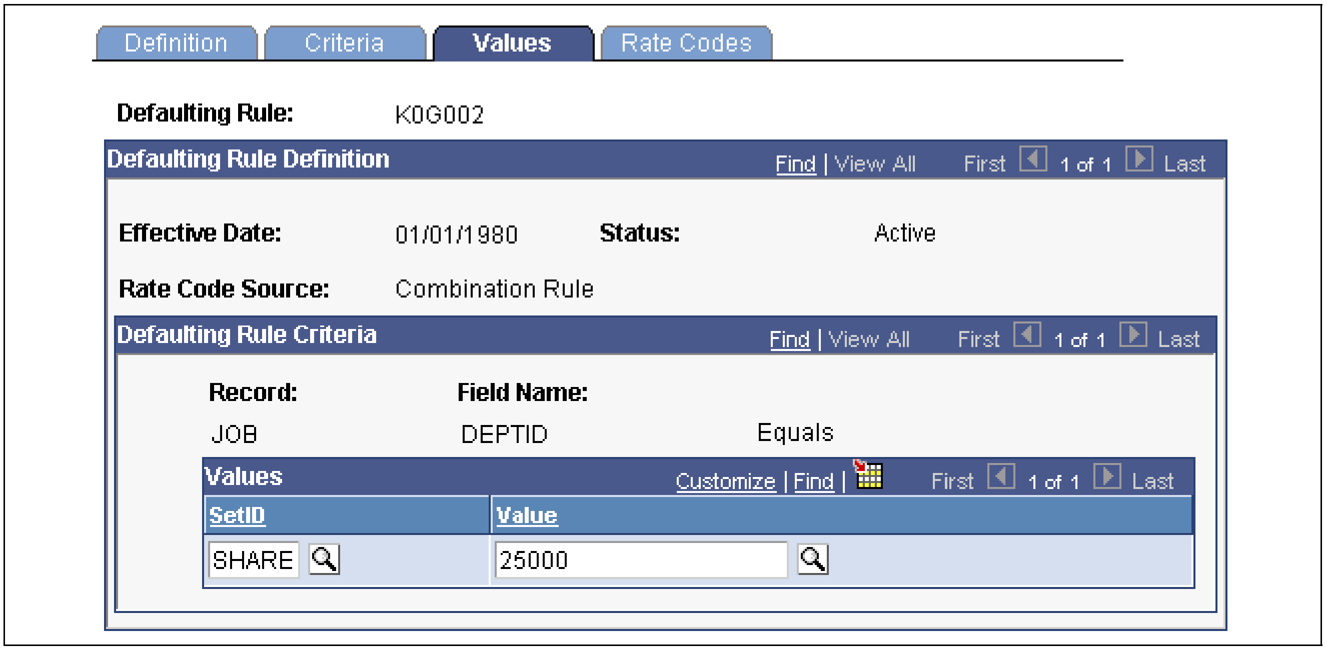

Criteria page

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

**SQL Operator**
Select the SQL operator that defines the relationship of the rule to the field values that you select on the Values page. For example, select *Equals* for the rule to act only on employees who have the field value specified on the Values page.

## Associating Values with Component Defaulting Rules Criteria

Access the Values page.



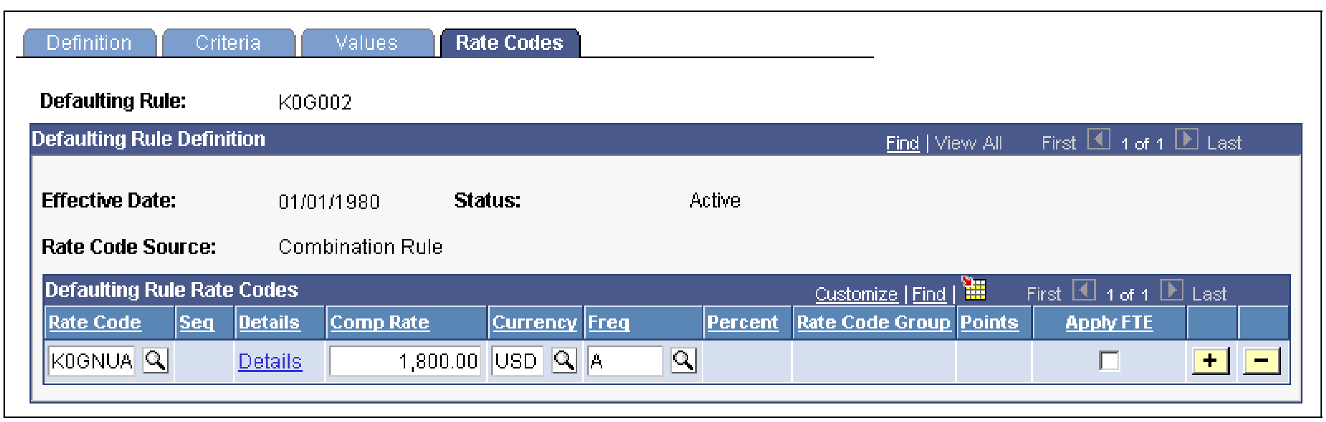

Values Page

**prompt field** and **Value** (in this screen shot the prompt field is labeled **SetID)**

If a prompt is required for the Value field (as specified on the Defaulting Options page), select the appropriate prompt value here. For example, select the department's setID in the prompt field and then select the department in the Value field.

# Assigning Rate Codes to Component Defaulting Rules

Access the Rate Codes page.




Rate Codes Page

Enter the compensation information to automatically populate the employee's compensation record.

**Details**

Click to access the Comp Rate Code Secondary Panel page and view additional information about the compensation rate code.

## CHAPTER 5

# Administering Seniority Pay

Many organizations pay a premium for seniority. Seniority is the length of time that employees work for the organization. This chapter discusses how to administer seniority pay.

## Administering Seniority Pay

To administer seniority pay:

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

   You can also add seniority rate codes to worker compensation packages manually. Even though you add these codes manually, the Update Seniority Pay (CMP013) process updates them.
2. Run the Update Seniority Eligibility process to determine if workers are still eligible for seniority pay components.

   If a worker is no longer eligible for seniority pay, the system removes the seniority rate code from that worker's compensation package. However, the process does not remove the seniority rate codes that were added manually.
3. Run the Multiple Seniority Components report and review the employee records that have multiple seniority rate codes and determine whether the seniority components are appropriate.

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

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

#### See Also

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Setting Up Groups," Setting Up Group Definitions

### Understanding the Update Seniority Pay Process

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

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

1. The system checks to see if adequate time has passed for the worker to reach the next seniority level.

2. If the worker is eligible for the next seniority level, the system inserts a new job row and adds a new compensation package with the seniority rate code and corresponding amount of pay for the next seniority level.

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

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

## Prerequisites

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

### See Also

Chapter 3, "Setting Up Administer Compensation," Defining Rate Codes, page 8

## Pages Used to Administer Seniority Pay

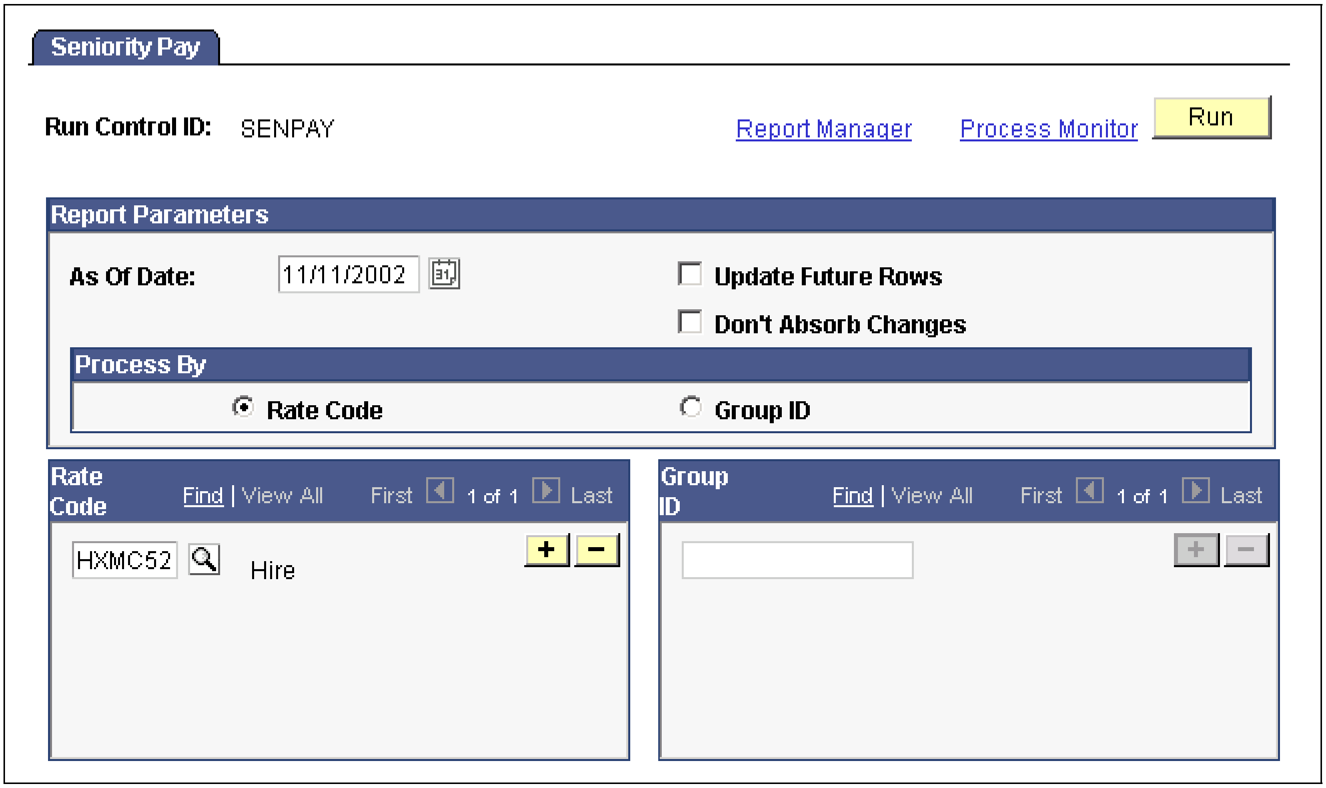
| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Update Seniority Pay - Seniority Pay | RUNCTL_SENPAY2 | Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Pay | Add and update seniority pay components in workers' compensation packages. |
| Update Seniority Eligibility - Seniority Pay , Multiple Seniority Components | RUNCTL_SENPAY | • Workforce Administration, Collective Processes, Seniority Processing, Update Seniority Eligibility<br>• Workforce Administration, Collective Processes, Seniority Processing, Multiple Seniority Components | 1. Run the Update Seniority Eligibility Process (HR_CMP014) to ensure that workers are still eligible for seniority pay components.<br>2. Generate the Multiple Seniority Components report (PER044). Use this report to review the employee records that have multiple seniority rate codes. |

### See Also

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "PeopleSoft Application Fundamentals for HRMS Reports," PeopleSoft HRMS Reports: Selected Reports

## Updating Seniority Pay Components

Access the Update Seniority Pay - Seniority Pay page.




Update Seniority Pay - Seniority Pay page

**Update Future Rows** Select to update all existing future effective-dated rows (rows that have an effective date later than the as of date) in addition to the effective-dated row it is adding or correcting.

**Don’t Absorb Changes** Select to leave absorbable rate codes unchanged if there is a change in the defaulted salary amount.

This option only applies to employees who have a target compensation rate and are assigned to a salary plan with the Auto Calculated Premium function enabled.

**Process By** Select Rate Code or Group ID as the way to run the Update Seniority Pay process (HR_COMP013).

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

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

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

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

### Running the Update Seniority Pay Process

To run the Update Seniority Pay process:

1. Run the Application Engine process HR_CMP013.

   The Application Engine processes find the employees that fall within the run control parameters and loads the information into a temporary table.

2. Run the SQR report CMP013 to review the data created by the Application Engine process.
3. Run the Application Engine process HR_CMP013_CI to load all the data to the employee Job Data pages.

### See Also

*PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries*, "Setting Up Plan Salaries," Defining Salary Plan Characteristics

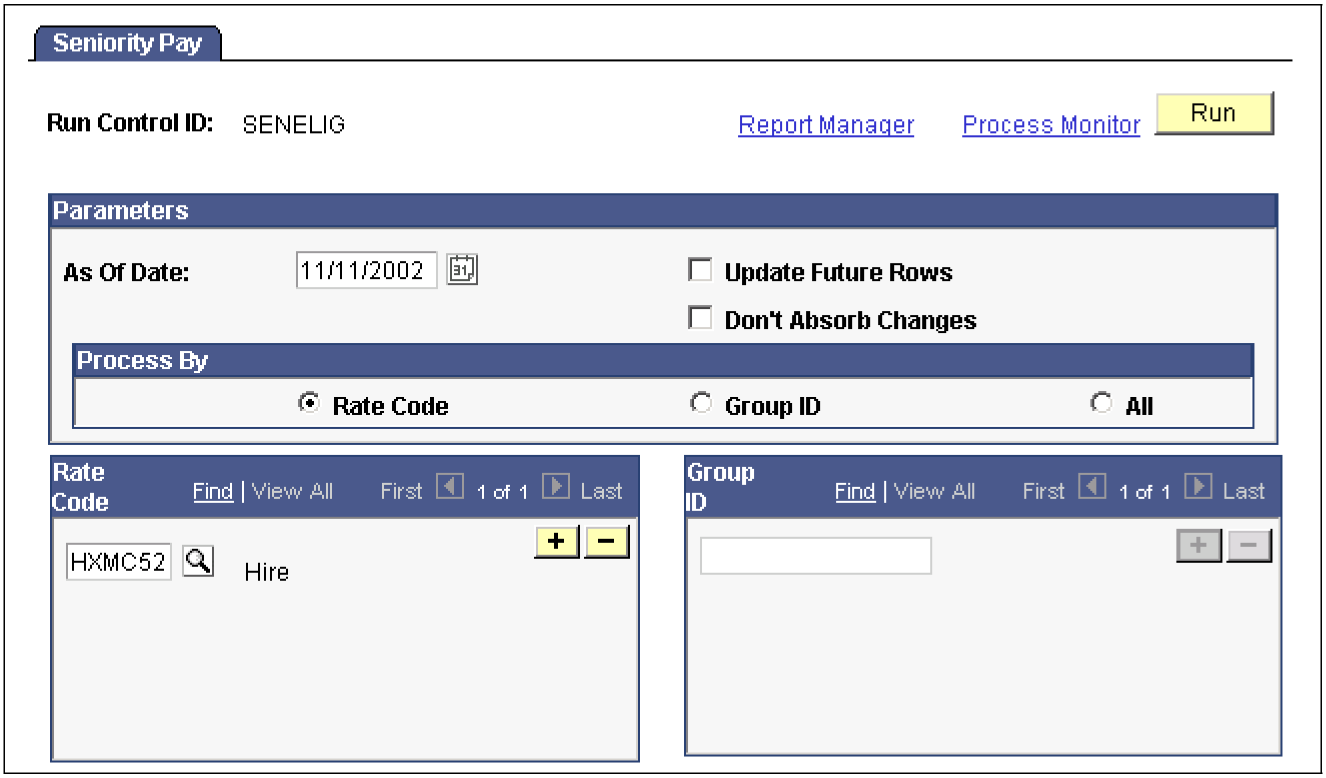
*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Setting Up Groups," Setting Up Group Definitions

*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Setting Up Groups," Setting Up Group Security

*PeopleTools 8.42 PeopleBook: PeopleSoft Process Scheduler*

## Ensuring Worker Eligibility for Seniority Pay Components

Access the Update Seniority Eligibility - Seniority Pay page.




Update Seniority Eligibility - Seniority Pay page

**Process By** Select All to run the report for all employees.

If a worker is not eligible, this process updates the employee compensation package by removing the seniority rate codes. However, this process does not remove seniority rate codes that were added manually.

---

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

---

## Running the Update Seniority Eligibility Process

To run the Update Seniority Eligibility process:

1. Run the Application Engine process HR_CMP014.

   The Application Engine processes find the employees that fall within the run control parameters and loads the information into a temporary table.

2. Run the SQR report CMP014S to review the data created by the Application Engine process.

3. Run the Application Engine process HR_CMP014_CI to load all the data to the employee Job Data pages.

## See Also

Chapter 5, "Administering Seniority Pay," Updating Seniority Pay Components, page 24

# CHAPTER 6

# Refreshing Employee Compensation Information

This chapter provides an overview of how compensation defaults work and discusses how to refresh employee compensation packages.

## Understanding Compensation Defaults

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

### Changing a Compensation Package

When you make a change to any element (or elements) of an employee's Job record that affects compensation, the system resets the compensation components when you click the Default Pay Components button on the Compensation page of the Job Data component. The system performs the following steps:

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

  You define these values when you set up rules-driven component defaulting.
- Replaces manual updates in default components with the current default values.
- Replaces the default values in non-updateable components with the current default values.
- Recalculates any compensation-related fields on the Job record, for example, comp rate, annual, hourly, daily amounts, compa-ratio, and so on.

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

### Recalculating Compensation

Click the Calculate Compensation button (on the Compensation page) to have the system recalculate the employee's compensation without executing any rate code defaulting or replacing any default values. You cannot save the record after modifying the employee's pay components without recalculating the compensation.

# Understanding Salary Plan Compensation Defaults

You specify an employee's salary administration plan, grade, and step on the Job Data – Salary Plan page. When you hire or make a change to the employee's job record, the system enters default salary plan information in the job record or leaves the salary plan fields blank for manual entry. The source of the default compensation depends on how you set up salary plan defaults in the system and/or the nature of the employee's job change.

### See Also

*PeopleSoft Human Resources PeopleBook: Plan Salaries*

## Setting Up Salary Plan Defaults

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

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

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

  You can enter a salary plan directly on the Job Data – Salary Plan page if there is no job code associated with the selected location or job code. You can also override any defaulted salary plan, step, or grade values.

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

---

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

---

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

### Salary Plan Defaulting at Hire

The system enters the following salary plan default values when you hire an employee:

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

- If you have not associated a salary plan with either the location or job code, the system will leave the salary plan, grade, and step fields available for entry.
- You may override the default salary plan values provided that the new values are valid.

---

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

---

### Salary Plan Defaulting After Hire

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

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

  If the grade and step are valid for the new location's salary plan, the system will enter the new salary plan on the Job Data - Salary Plan page.
- If the grade and step are *not* valid for the new location's salary plan, the system will leave in the existing salary plan value. This will ensure that the employee is not inadvertently left without a compensation plan.

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

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

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

---

**Note.** The system will not insert base rate code information associated with the new job code in an existing Job record when you click the Default Pay Components button. It will only insert this information when you create a new Job recording (hiring an employee).

---

# Refreshing Employee Compensation Packages

Use the Refresh Employee Compensation process to update employee compensation packages. This process recalculates compensation based on the current values in the system and automatically populates the correct compensation amount by inserting a new Job row (unless there is no change to an employee's compensation). The process replaces manual changes with the new default values.

This section provides an overview of the Refresh Employee Compensation process and discusses how to run the Refresh Employee Compensation process.

## Understanding the Refresh Employee Compensation Process

The Refresh Employee Compensation process executes the same steps as the Default Pay Components button on the Compensation page, but you can update several records at once.

The Refresh Employee Compensation process:

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

### See Also

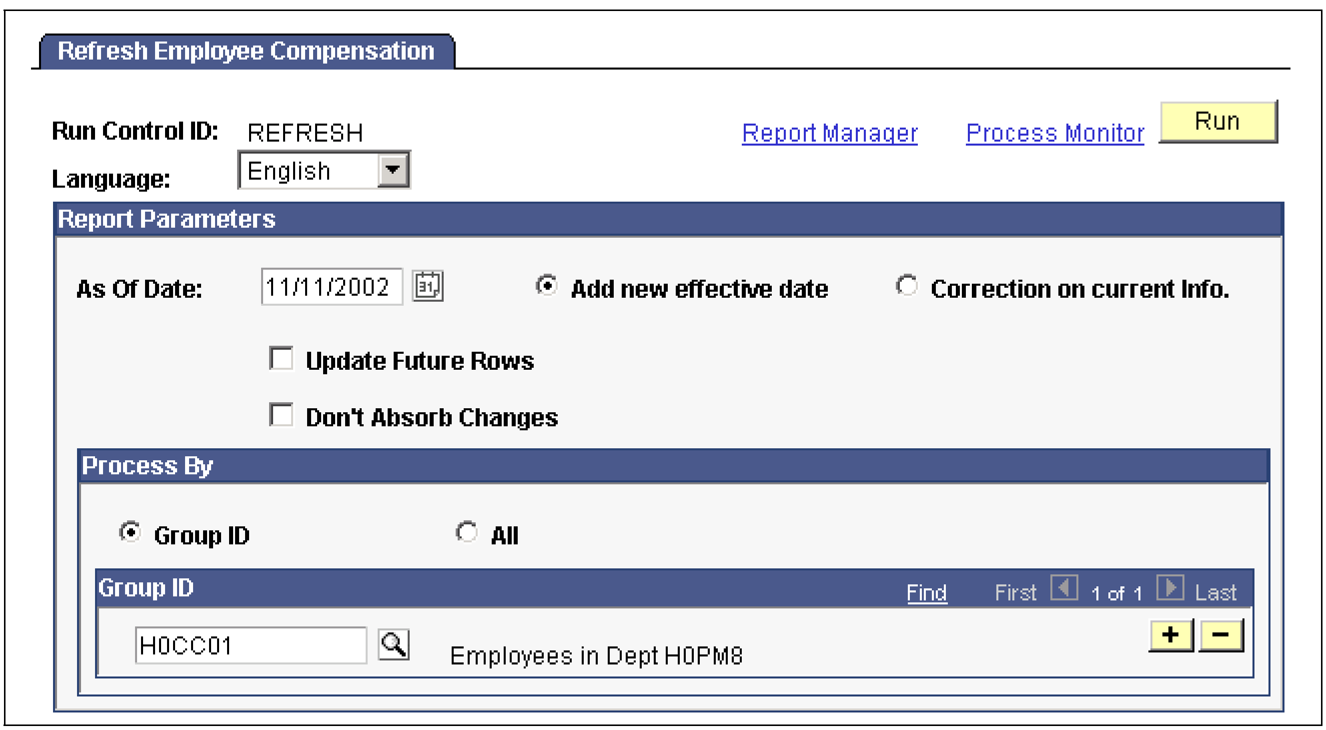
Chapter 4, "Defining Compensation Rates and Rules-Driven Component Defaulting," Understanding Rules-Driven Component Defaulting, page 15

## Page Used to Refresh Employee Compensation Packages

| Page Name | Object Name | Navigation | Usage |
|---|---|---|---|
| Refresh Employee Compensation | RUNCTL_CMP015 | Workforce Administration, Collective Processes, Refresh Compensation | Refresh multiple employee compensation packages with current default values and print a report that displays the new and previous compensation data of the impacted employees for you to compare. |

## Running the Refresh Employee Compensation Process

Access the Refresh Employee Compensation page.




Refresh Employee Compensation page

### Report Parameters

| | |
|---|---|
| **As Of Date** and **Correction on current Info.** | Select to update data and override information in employee records. The system updates the record that is or was effective as of the date you enter. |
| **As Of Date** and **Add new effective date** | Select to insert a new effective-dated row using the reference date (As Of Date) as the new effective date. For example, you enter *01/01/2003* in As of Date and run the process. The process inserts a new Job row with an effective date of 01/01/2003.<br><br>If a record already exists with this effective date, the system inserts a row with the date and a sequence number. |
| **Update Future Rows** | Select to update all existing future effective-dated rows (rows that have an effective date later than the as of date) in addition to the effective-dated row already being added or corrected. |
| **Don't Absorb Changes** | Select to leave absorbable rate codes unchanged if there is a change in the defaulted salary amount.<br><br>This option only applies to employees who have a target compensation rate and are assigned to a salary plan with the Auto Calculated Premium function enabled. |

### Process By

| | |
|---|---|
| **Group ID** | Select to process by group ID. The update process selects all employees with the group ID you specify. |
| **All** | Select to process all employees you have security access to. |

### Running the Refresh Employee Compensation Process and Report

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

Once you have run this process, you can run the Refresh Employee Compensation report (CMP015), an SQR, to review the data that has been updated. This report displays the new and previous compensation data of the impacted employees for you to compare.

### See Also

*PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries*, "Setting Up Plan Salaries," Defining Salary Plan Characteristics

# 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 anotherand 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 methodit 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 *sub-classification.*

**clone** In PeopleCode, to make a unique copy. In contrast, to *copy* 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 activitys 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 youre 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 valuesdynamic detailsdirectly 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 *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations 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 *Enterprise Incentive Management ledger.* 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, *event* 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 *activity.*

**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 *rates*) 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 applicationfor 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 addressesfor 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 locationindicated by a *1* 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 *participant object.*

**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 contextif 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 *Batch Processes.*

**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 *record input value-added tax flag.* 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 *record output value-added tax flag.*

See *record input VAT flag.*

**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 takesemail 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 activitycharacteristics 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 *Structured Query Report (SQR).*

**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 *basis* 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: http://serverx/InternetClient /InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_ 401k.PAGES.FieldFormula.iScript_Home401k |
| **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.

# Index