



PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Compensation

April 2005

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc. (“PeopleSoft”), protected by copyright laws and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this document is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this document, including the disclosure thereof.

PeopleSoft, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, PeopleTalk, and Vantive are registered trademarks, and Pure Internet Architecture, Intelligent Context Manager, and The Real-Time Enterprise are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners. The information contained herein is subject to change without notice.

Open Source Disclosure

PeopleSoft takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in PeopleSoft products and the following disclaimers are provided.

Apache Software Foundation

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright © 1999-2000 The Apache Software Foundation. All rights reserved.

THIS SOFTWARE IS PROVIDED “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

OpenSSL

Copyright © 1998-2003 The OpenSSL Project. All rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (<http://www.openssl.org/>).

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

SSLeay

Copyright © 1995-1998 Eric Young. All rights reserved.

This product includes cryptographic software written by Eric Young (eay@cryptsoft.com). This product includes software written by Tim Hudson (tjh@cryptsoft.com). Copyright © 1995-1998 Eric Young. All rights reserved. THIS SOFTWARE IS PROVIDED BY ERIC YOUNG “AS IS” AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE AUTHOR OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Loki Library

Copyright © 2001 by Andrei Alexandrescu. This code accompanies the book:

Alexandrescu, Andrei. “Modern C++ Design: Generic Programming and Design Patterns Applied.” Copyright © 2001 Addison-Wesley. Permission to use, copy, modify, distribute and sell this software for any purpose is hereby granted without fee, provided that the above copyright notice appear in all copies and that both that copyright notice and this permission notice appear in supporting documentation.

Helma Project

Copyright © 1999-2004 Helma Project. All rights reserved.

THIS SOFTWARE IS PROVIDED “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE HELMA PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Helma includes third party software released under different specific license terms. See the licenses directory in the Helma distribution for a list of these license.

Sarissa

Copyright © 2004 Manos Batsis.

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA.

Contents

General Preface

About This PeopleBook Preface	ix
PeopleSoft Application Prerequisites.....	ix
PeopleSoft Application Fundamentals.....	ix
Documentation Updates and Printed Documentation.....	x
Obtaining Documentation Updates.....	x
Ordering Printed Documentation.....	x
Additional Resources.....	xi
Typographical Conventions and Visual Cues.....	xii
Typographical Conventions.....	xii
Visual Cues.....	xiii
Country, Region, and Industry Identifiers.....	xiv
Currency Codes.....	xiv
Comments and Suggestions.....	xiv
Common Elements Used in PeopleBooks.....	xv

Preface

PeopleSoft Enterprise Human Resources Administer Compensation Preface.....	xvii
PeopleSoft Products.....	xvii
PeopleSoft Enterprise Application Fundamentals.....	xvii
PeopleBook Structure.....	xvii
Common Elements in This PeopleBook.....	xx

Chapter 1

Getting Started with Administer Compensation.....	1
Administer Compensation Overview.....	1
Administer Compensation Business Processes.....	1
Administer Compensation Integrations.....	2
Administer Compensation Implementation.....	2

Chapter 2

Setting Up Administer Compensation.....	5
Understanding Administer Compensation.....	5

Setting Up Rate Codes.....	6
Pages Used to Set Up Rate Codes.....	6
Creating Rate Code Classes.....	6
Defining Rate Codes.....	7
Creating Seniority Rate Codes.....	10
Associating Seniority Rate Codes with Compensation Increases.....	10
Viewing Defaulting Rules Associated with Compensation Rate Codes.....	12
Defining Groups of Rate Codes.....	13
Understanding Rate Code Groups.....	13
Understanding Percentages and Rate Code Groups.....	13
Page Used to Create Groups of Rate Codes.....	14

Chapter 3

Defining Compensation Rates and Rules-Driven Component Defaulting.....	15
Understanding Rules-Driven Component Defaulting.....	15
Defining Compensation Rates for Workers.....	16
Defining Rules-Driven Component Defaulting.....	16
Pages Used to Define Rules-Driven Component Defaulting.....	17
Specifying Fields That Should Be Available When Defining Component Defaulting Rules.....	17
Defining Component Defaulting Rules.....	18
Creating Component Defaulting Rules Criteria.....	19
Associating Values with Component Defaulting Rules Criteria.....	20
Assigning Rate Codes to Component Defaulting Rules.....	20

Chapter 4

Using Wage Progression with Administer Compensation.....	23
Understanding Wage Progression and Administer Compensation.....	23
Prerequisites.....	23
Setting Up and Using Wage Progression with Administer Compensation.....	24
Pages Used to Set Up and Use Wage Progression with Administer Compensation.....	25
Defining a Salary Plan with a Wage Progression Rule.....	25
Defining Wage Progression Rules.....	26
Applying Wage Progression Rules to Salary Plans.....	30

Chapter 5

Administering Seniority Pay.....	33
Understanding the Update Seniority Pay Process.....	33

Administering Seniority Pay.....	33
Prerequisites.....	34
Pages Used to Administer Seniority Pay.....	34
Updating Seniority Pay Components.....	34
Ensuring Worker Eligibility for Seniority Pay Components.....	36

Chapter 6

Refreshing Worker Compensation Information.....	39
Understanding Compensation Defaults.....	39
Changing a Compensation Package.....	39
Recalculating Compensation.....	39
Understanding Salary Plan Compensation Defaults.....	40
Setting Up Salary Plan Defaults.....	40
Refreshing Worker Compensation Packages.....	41
Understanding the Refresh Employee Compensation Process.....	41
Page Used to Refresh Worker Compensation Packages.....	42
Running the Refresh Employee Compensation Process.....	42

Chapter 7

Using Population Management.....	45
Understanding Population Management.....	45
Prerequisites.....	45
Common Elements Used in This Section.....	46
Creating and Maintaining Population Trees.....	46
Pages Used to Create and Maintain Population Trees.....	47
Creating Population Management Trees.....	47
Maintaining Population Trees.....	48
Finding Workers on Population Trees.....	50
Defining Tree Views.....	51
Viewing Base Compensation.....	54
Viewing Group Budgets.....	55
Comparing Population Trees.....	56
Creating Groups.....	58
Setting Group Security by Operator.....	60

Glossary of PeopleSoft Terms.....63

Index 85

About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

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

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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, <https://www.peoplesoft.com/corp/en/login.jsp>

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

If the note is preceded by *Important!*, the note 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.

Cross-References

PeopleBooks provide cross-references either under 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.

Country, Region, and Industry Identifiers

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

Example of a country-specific heading: “(FRA) Hiring an Employee”

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

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Human Resources Administer Compensation Preface

This preface discusses:

- PeopleSoft Products.
- PeopleSoft application fundamentals.
- PeopleBook structure.
- Common elements in this PeopleBook.

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

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Administer Compensation.

PeopleSoft Enterprise Application Fundamentals

The *PeopleSoft Enterprise Human Resources Enterprise 8.9 PeopleBook: Administer Compensation* provides implementation and processing information for your PeopleSoft Enterprise Human Resources Administer Compensation system. Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*. Each PeopleSoft Enterprise product line has its own version of this documentation. Each PeopleSoft Enterprise product line has its own version of this documentation.

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications across the PeopleSoft Enterprise HRMS product line. No matter which HRMS products you are implementing, you should become familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook

PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation 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.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. Note. Not all applications have delivered custom navigation pages.
Understanding...	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

Chapters	Description
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. 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. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. Note. Not all applications have delivered workflows.
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.

Common Elements in This PeopleBook

Frequency	Enables you to select a frequency (hourly, daily, monthly, annually, and so on) in which to express the compensation rate.
Base Pay	Pay for a regularly assigned workweek. A pay component that is included in the job compensation rate calculation. For example, an employee's base compensation package may be made up of the following components: base pay, cost of living, child-care cost, and commuting cost.
Compensation Package	All of the base and non-base pay components on a job row.
Job Code	An ID for a job as defined on the Job Code table.
Job Code Component	A pay component assigned to a job code. A pay component is defined by associating a rate code with a job code on the Default Compensation page or the Non-Base Compensation page of the Job Code table.
Job Compensation Rate	The compensation rate of the corresponding job row.
Non-Base Pay	A pay component that is used by Payroll only in paysheet calculation. It is not included in the job comp rate calculation. For example, non-base pay can be set up for additional work, holiday pay, bonuses, and so on.
Pay Component	A row in a compensation record that builds the compensation packages in that record.
Rate Code	The ID of a pay component. It defines a rate of pay. Rate Code represents pay components on pages and when configuring compensation packages in a compensation record. Rate Code is set up in the Comp Rate Code (compensation rate code) table.
Rate Code Group	A number of pay components (represented by rate codes) that are bundled into a subset of a compensation package. The rate code group is used to calculate percentage-based components that do not apply the percentage to all pay components in the compensation package. Rate code groups are set up on the Rate Code Groups page.
Rate Code Type	Determines how the monetary value of a rate code is calculated. The compensation rate code type is defined on the Comp Rate Code table. Valid values are Flat Amount, Hourly Rate + Flat Amount, Hourly Rate, Percent, and Points.
Rate Matrix	A matrix that is associated with a rate code, which applies rules and formulas to determine the amount or rate for a specific employee.
Rules-Driven Pay Component	A pay component that uses rules to determine the appropriate rate code to assign to an employee. Rules are set up in the Comp Rate Code Rules component.
Salary Step Component	A pay component that is assigned to a salary step by entering the corresponding rate code on the Salary Step Components page.
Seniority Pay	A premium that is paid for the length of time that an employee has worked for an organization.

Seniority Pay Component	A pay component that has a rate code with the seniority rate code class (SENPAY). This class is provided by PeopleSoft and is assigned on the Comp Rate Table page. You use it to access the seniority pay functionality.
Seniority Rate Code	A rate code associated with the seniority rate code class (SENPAY). This class is provided by PeopleSoft and is assigned on the Comp Rate Code Table page. You set up levels of pay increase for these codes on the Seniority Pay page of the Comp Rate Code component.

CHAPTER 1

Getting Started with Administer Compensation

This chapter discusses:

- Administer Compensation business processes.
- Administer Compensation implementation.

Administer Compensation Overview

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

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

With Administer Compensation, you can:

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

Administer Compensation Business Processes

Administer Compensation provides the following business processes:

- Defining Compensation Rates and Rules-Driven Component Defaulting.

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

- Administering Seniority Pay.

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

- Refreshing Employee Compensation Information.

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

- Using Market Pay.

Capture market pay data to represent the conclusion of a job valuation or market pricing business processes. We discuss these business processes in the business process chapters in this PeopleBook.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up and Working with Market Pay”

Administer Compensation Integrations

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

Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many Human Resources 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 Enterprise Human Resources Administer Workforce.
- PeopleSoft Enterprise Human Resources Manage Base Compensation and Budgeting.
- PeopleSoft Enterprise Human Resources Manage Positions.

We discuss integration considerations in this PeopleBook.

Administer Compensation Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

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

This table lists the component that has a setup component interface:

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

Component	Component Interface	References
JOB_CODE_TBL	CI_JOB_CODE_TBL	See <i>PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook</i> , “Setting Up Jobs,” Defining Job Function Codes.
SALARY_GRADE_TBL	SALARY_GRADE_TBL	See <i>PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting</i> , “Setting Up Base Compensation and Budgeting,” Setting Up Salary Plans, Grades, and Steps.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook

CHAPTER 2

Setting Up Administer Compensation

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

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

Understanding Administer Compensation

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Jobs”

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, “Setting Up Base Compensation and Budgeting”

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, “Setting Up Positions”

Setting Up Rate Codes

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

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

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

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

Pages Used to Set Up Rate Codes

Page Name	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. • One or more groups that you define using Group Build.
Comp Rate Code Table - Combination Rules	COMP_RATECD_RULES	Set Up HRMS, Foundation Tables, Compensation Rules, Comp Rate Code Table, Combination Rules	View defaulting rules associated with a compensation rate code.

Creating Rate Code Classes

Access the Rate Code Classes page.

Rate Code Classes	
Rate Code Class:	SENPAY
Rate Code Class Information Find View All First ◀ 1 of 1 ▶ Last	
*Effective Date:	01/01/1900  *Status: Active  + -
*Description:	Seniority Rate Codes
Short Description:	Sen Rate Codes

Rate Code Classes page

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

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

Defining Rate Codes

Access the Comp Rate Code Table page.

Comp Rate Code Table Seniority Pay Combination Rules	
Comp Rate Code:	HXLMS1
Compensation Rate Code Information Find View All First ◀ 1 of 1 ▶ Last	
*Effective Date:	01/01/1900  *Status: Active  + -
*Description:	Base Salary
Short Description:	Base Salar
☒ Base Pay ☐ Use Highest Rate ☒ Apply FTE ☐ Default Without Override	
*Rate Code Type:	Flat Amount 
Rate Code Class:	BASSAL  Elements of Base Salary
*Calculated By:	Rate Matrix  Rate Matrix Name: 
Compensation Rate:	1,000.00  Comp Percent: 0.000
Currency:	FRF 
Frequency:	M  Monthly
Earnings Code:	
 Australia	
Salary Packaging	
☐ Maintained via Package Only	

Comp Rate Code Table page

Use Highest Rate

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

For Payroll for North America: When you assign rate code at the job level, you can enter a compensation rate that differs from the rate defined on the rate code table. If you 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 a worker normally works in the corresponding job. Full time is defined in the Standard Hours and Standard Work Period fields on the Salary Plan table. Alternatively, it can be defined in the default Standard Hours and Standard Work Period fields on the Installation table.

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

Default Without Override

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

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

Rate Code Type

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

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

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

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “Setting Up and Installing PeopleSoft HRMS,” Setting Up Implementation Defaults.

Rate Code Class

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

- *Elements of Base Salary (BASSAL):* Used in salary forecasting.
- *Defined Range Rate Codes (DFRPAY):* Used for pay components that are based on grade ranges within salary plans.

- *Regular Bonus (REGBON)*: Used in salary forecasting.
- *Seniority (SENPAY)*: Enables you to create seniority pay components, associate them with levels of pay increase, and update them according to changing seniority status.

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

Calculated By

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

- *None*: The rate on the rate code table itself is used.
This value uses the current functionality.
- *Rate Matrix*: The value will be derived dynamically from a rate matrix associated with the rate code.
The rate matrix may have multiple criteria that determine different rates to be used.

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

Rate Matrix

Select the specific rate matrix to be used.

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

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

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, “Using Configurable Matrices”.

Comp Percent (compensation percentage)

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

Compensation Rate

Enter the standard compensation rate for this rate code. .

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

Currency

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

Frequency

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

Earnings Code

Select an earnings code. An earning code determines how earnings are calculated and taxed. You establish earnings codes on the Job Earnings Distribution page.

Australia

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

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

Maintained via Package Only

Select to create a link between a salary package component and the compensation rate code.

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

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

Using Rate Codes — Example

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Salary Packaging for Australia

Creating Seniority Rate Codes

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

To create a seniority rate code:

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

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

Associating Seniority Rate Codes with Compensation Increases

Access the Comp Rate Code Table - Seniority Pay page.

The screenshot shows the 'Seniority Pay' configuration page. At the top, there are three tabs: 'Comp Rate Code Table', 'Seniority Pay' (selected), and 'Combination Rules'. Below the tabs, the 'Comp Rate Code' is set to 'HXLMS1'. The 'Seniority Pay Information' section includes an 'Effective Date' of '01/01/1900' and a 'Calculate Seniority By' section with three radio buttons: 'Hire Date' (selected), 'Company Seniority Date', and 'Birth Date'. Below this, there is a dropdown menu for 'Japan' with a Japanese flag icon. The 'Calculate Seniority By' section also includes a checkbox for 'Educ Lvl-Adjsted Birth Date'. The 'Seniority Pay Group' section has a '*Group ID' field. The 'Seniority Pay Compensation' section is a table with columns: '*Level', 'Min. Years', 'Min. Months', 'Comp Rate', 'Currency', and 'Frequency'. The first row shows '1' in the '*Level' column.

Comp Rate Code Table - Seniority Pay page

Calculate Seniority By

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

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

(JPN) Japan

Educ Lvl-Adjsted Birth Date (education level-adjusted birth date)

Select to calculate education level age-related pay, a type of seniority pay commonly paid by Japanese organizations.

Seniority Pay Group**Group ID**

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

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

Seniority Pay Compensation

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

Viewing Defaulting Rules Associated with Compensation Rate Codes

Access the Comp Rate Code Table - Combination Rules page.

The screenshot shows the 'Comp Rate Code Table - Combination Rules' page. At the top, there are tabs for 'Comp Rate Code Table', 'Seniority Pay', and 'Combination Rules'. Below the tabs, the 'Comp Rate Code' is set to 'HXLMS1'. The 'Compensation Rate Code Information' section shows 'Effective Date: 01/01/1900' and 'Status: Active'. Below this, the 'Combination Defaulting Rules using this Rate Code' section is displayed. It includes a 'Customize' link and a 'Find' button. The table has columns for 'Defaulting Rule', 'Eff Date', 'Status', 'Short Descr', and 'Source'. The table is currently empty. At the bottom, there is a link 'Edit Defaulting Rules'.

Comp Rate Code Table - 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, where you edit the information for the defaulting rules.

Values tab

Access the Values tab.

Combination Defaulting Rules using this Rate Code				
Rules		Values		
Defaulting Rule	Comp Rate	Currency	Frequency	Apply FTE
				☐

Combination Rules: Values page

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

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

Defining Groups of Rate Codes

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

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

Understanding Rate Code Groups

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

- Be specific when calculating percentage-based pay components as part of your worker compensation packages.
For example, a worker's base compensation package may be made up of the following components: base pay, cost of living, child-care cost, and commuting cost.
- Calculate a bonus amount based only on certain parts of a worker's compensation package, as opposed to the entire package.
You may want to do this if a percentage-based bonus is part of a worker's compensation.
- Bundle base-pay components that you want the system to use in its calculation, excluding other pay components.

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

Understanding Percentages and Rate Code Groups

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

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

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

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

- At the worker level on the Job Data - Compensation page.

Page Used to Create Groups of Rate Codes

Page Name	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 3

Defining Compensation Rates and Rules-Driven Component Defaulting

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

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

Understanding Rules-Driven Component Defaulting

This section discusses rules-driven component defaulting.

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

To set up component defaulting rules:

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

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

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

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

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

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

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

Defining Compensation Rates for Workers

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

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

Overview of Steps for Defining Rates of Pay

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Jobs,” Associating Salary Plan Information and Base Pay Rate Codes with a Job Code

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions, “Setting Up Positions,” Creating Positions

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Increasing the Workforce”

Defining Rules-Driven Component Defaulting

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

- Specify fields that should be available when defining component defaulting rules.

- Define component defaulting rules header information.
- Create component defaulting rules criteria.
- Associate values with component defaulting rules criteria.
- Assign rate codes to component defaulting rules.

Pages Used to Define Rules-Driven Component Defaulting

Page Name	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 rule header information.
Criteria	CMP_RULE_CRITERIA	Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Criteria	Create and modify criteria for component defaulting rules.
Values	CMP_RULE_VALUES	Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Values	Specify the values that the fields and operators you selected on the Criteria page should act on.
Rate Codes	CMP_RULE_RATECD	Set Up HRMS, Foundation Tables, Compensation Rules, Rate Code Defaulting Rules, Rate Codes	Assign rate codes to the component defaulting rules.
Rate Code	WCS_RTCD_DETAILS	Click Details on the Rate Codes page.	View additional information about the compensation rate code.

Specifying Fields That Should Be Available When Defining Component Defaulting Rules

Access the Defaulting Options page.

Defaulting Options

Record: JOB EE Job History

Defaulting Rule Options Find | View All First 1 of 15 Last

*Field Name: BUSINESS_UNIT

*Field Label: Business Unit

Edit Table: BUSUNIT_HR_VW HR Business Unit Lang Table

Prerequisite Fields Customize | Find First 1 of 1 Last

	*Required for Prompt	*Field Label	Equivalent Record Field
1			

Defaulting Options page

Defaulting Rules Options

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

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

Prerequisite Fields

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

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

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

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

Defining Component Defaulting Rules

Access the Definition page.

Section Name | **Definition**

Element Name: KOSE ABS Absences **Owner:** PS Non-Mnt

Definition Find First 1 of 1 Last

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

***Section Use:** Absence Process Only

***Section Type:** Standard

Section Element List Customize | Find | View All First 1-5 of 6 Last

Elements | Driver Accumulator

*Seq Nbr	*Element Type	*Element Name	Description	Recalc		
1	Abs Entitl	KDAE FHOL	Floating Holiday	☐		
2	Abs Entitl	KDAE PTO	PTO	☐		
3	Abs Take	KDAT PTO	Absence PTO	☐		
4	Abs Take	KDATSICK	Sickness	☐		
5	Abs Take	KDAT SICK2	Sickness	☐		

Definition page

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

Creating Component Defaulting Rules Criteria

Access the Criteria page.

Criteria | **Criteria Details**

Business Unit: PSUNV **Criteria:** HONORS

Find | View All First 1 of 1 Last

***Effective Date:** 01/01/2005 ***Status:** Active

***Description:** Honors Waiver

Long Description: Honors Waiver

***Criteria Type:** Trigger Criteria

Criteria page

Record, Field Name, and Edit Table

Select the record and the name of the field whose value will trigger this rule. The system displays the field's edit table.

SQL Operator

Select the Structured Query Language (SQL) operator that defines the relationship of the rule to the field values that you select on the Values page.

For example, select *Equals* if you want the rule to act only on workers who have the field value specified on the Values page.

Associating Values with Component Defaulting Rules Criteria

Access the Values page.

Optional Fees | **Values**

SetID: PSUNV **Fee Code:** PRKING Parking

Find | View All First 1 of 1 Last

Effective Date: 01/01/1900 **Status:** Active

Customize | Find | View All First 1-2 of 2 Last

*Valid Value	*Description	Short Description	Initial Value	
NOPARK	No Parking Sticker	No Parking	☒	+ -
PRKING	Parking Sticker	Parking St	☐	+ -

Values page

prompt field and **Value** (on this sample page, the prompt field is labeled **SetID**)

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

Assigning Rate Codes to Component Defaulting Rules

Access the Rate Codes page.

Definition | Criteria | Values | **Rate Codes**

Defaulting Rule: K0G002

Defaulting Rule Definition Find | View All First 1 of 1 Last

Effective Date: 01/01/1980 **Status:** Active

Rate Code Source: Combination Rule

Defaulting Rule Rate Codes Customize | Find | View All First 1 of 1 Last

Rate Code	Seg	Details	Comp Rate	Currency	Freq	Percent	Rate Code Group	Points	Apply FTE
K0G002		Details	1,800.00	USD	A				☐ + -

Rate Codes page

Rate Code

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

Details

Click to access the Rate Code page and view additional information about the compensation rate code. If there is a rate matrix associated with the rate code, you can also view the matrix from this page.

Comp Rate (compensation rate)

Enter the compensation rate for this defaulting rate code rule.

If the rate code type is *Flat Amount*, *Hourly Rate*, or *Hourly Rate + Flat Amount*, enter a compensation rate for the rate code.

Note. This field is unavailable if you are using a rate code that has an associated rate matrix. In that case, the compensation rate is determined dynamically based on the rate matrix and will be updated directly on the worker's job compensation record when the defaulting rule is triggered.

CHAPTER 4

Using Wage Progression with Administer Compensation

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

Understanding Wage Progression and Administer Compensation

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

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

Prerequisites

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

- Use Human Resources as your core system of record for worker information.
The worker must be assigned a bargaining unit, labor agreement, and a salary plan that includes a wage progression rule.
- Select Multi-Step Grade option on the Installation Table - HRMS Options page (Set Up HRMS, Install, Installation Table, HRMS Options).
- Determine if your wage progression rules require time worked data.

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

See Also

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, “Setting Up the Payroll Process,” Establishing Special Accumulator Codes

PeopleSoft Enterprise Payroll for North America 8.9 PeopleBook, “Defining Earnings Codes and Earnings Programs”

Setting Up and Using Wage Progression with Administer Compensation

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

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

This section discusses how to:

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

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

Page Name	Object Name	Navigation	Usage
Salary Plan Table	SALARY_PLAN_TABLE	- Set Up HRMS, Product Related, Compensation, Base Compensation, Salary Plan - Compensation, Base Compensation, Maintain Plans, Define Salary Plan	Define salary plan basics.
Define Wage Progression Rule	SALARY_PLAN_TABLE2	- Set Up HRMS, Product Related, Compensation, Base Compensation, Salary Plan - Compensation, Base Compensation, Maintain Plans, Define Salary Plan When you select the Wage Progression Plan check box, the Define Wage Progression link appears.	Define wage progression rules associated with a salary plan.
Salary Step Components	SALARY_GRADE_T3GBL	Compensation, Base Compensation, Maintain Plans, Define Salary Grades	Generate salary steps using wage progression rules.

Defining a Salary Plan with a Wage Progression Rule

Access the Salary Plan Table page.

Salary Plan Table	
SetID:	SHARE
Salary Administration Plan:	KUH1 Business Units that use this Setid
Salary Plan Find View All First 1 of 1 Last	
*Effective Date:	01/01/1980
*Status:	Active
*Description:	Professional Workers
Short Description:	Profession ☒ Wage Progression Plan Define Wage Progression Rule
*Standard Hours:	40.00
*Currency Code:	USD US Dollar
Default Salary Matrix Code:	
Default Rating Model:	
Company:	GBI Global Business Institute 9999
Frequency Defaults Hourly: H Hourly Daily: D Daily Monthly: M Monthly	
Auto Calculated Premium ☐ Auto Calculated Premium Absorbing Premium: Non-Absorbing Premium:	
Attached File URL Identifier: File Name: Long Description: Added By: Date Added:	

Salary Plan Table page

Salary Plan

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

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

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, “Setting Up Base Compensation and Budgeting,” Associating Salary Components With Salary Steps.

Defining Wage Progression Rules

Access the Define Wage Progression Rules page.

SetID: SHARE Salary Administration Plan: KUH1

Salary Plan

Effective Date: 01/01/1980 Status: Active Description: Professional Workers

Step Generation Rules

*Rate Calculation: Amt Increase

*Increment Type: Elapsed Weeks

Comp Rate Code: NAHRLY Default NA Hourly

Leave Accumulator: K20 ST - Vacation + Sick Hours

Advancement Processing Rules

☐ Exceed maximum for Grade

☒ Round to Max of Grade Within

Tolerance Type: Flat Amount

Tolerance Amount: 0.050000 USD

☒ Advancement Approval Required

Days Within: 5

Job Action: PAY Reason: SPG

Wage Progression Steps Customize | Find | View All | First 1-7 of 7 Last

*Step	Step Description	Time Required In Step	Units	Increase Amount	Currency Code	Maximum Leave Hours		
1	Amt Inc Elap Wks Appr Step 1	4.0000	Weeks		USD		+	-
2	Amt Inc Elap Wks Appr Step 2	4.0000	Weeks	1.000000	USD		+	-
3	Amt Inc Elap Wks Appr Step 3	4.0000	Weeks	0.250000	USD		+	-
4	Amt Inc Elap Wks Appr Step 4	4.0000	Weeks	0.250000	USD		+	-
5	Amt Inc Elap Wks Appr Step 5	4.0000	Weeks	0.250000	USD		+	-
6	Amt Inc Elap Wks Appr Step 6	52.0000	Weeks	0.250000	USD	40.00	+	-
7	Amt Inc Elap Wks Appr Step 7		Weeks	3.500000	USD		+	-

Define Wage Progression Rules page

Step Generation Rules

Rate Calculation

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

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

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

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

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

Increment Type

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

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

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

Comp Rate Code (compensation rate code)

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

Hours Accumulator

Only available if you select an Increment Type of *Hours Worked*. Select the Payroll for North America Payroll special accumulator to use in order to capture the hours worked for this wage progression rule.

Leave Accumulator

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

Advancement Processing Rules

Exceed maximum for Grade

(Optional) This field is only available if the calculation method is an increase type. Select this check box if it is acceptable for the worker's new step rate to exceed the maximum for the grade.

Round to Max of Grade (round to maximum of grade)

(Optional) This field is only available if the calculation method is an increase type. Select this check box if you want to round the calculated new rate value to the grade maximum value when it is within the specified tolerance.

Tolerance Type

This field indicates the closeness unit that you want the rounding rule to evaluate. Select one of these values:

- *Percent*: Enter the percent for the tolerance.

If you select this option, the Tolerance Percent field becomes available.

- *Flat*: Enter the amount of the tolerance.

If you select this option, the Tolerance Amount field becomes available.

Tolerance Percent

Enter the percent for rounding purposes. This field is available if you select percent as a Tolerance Type.

Tolerance Amount	Enter the amount for rounding purposes. This field is available if you select <i>Flat</i> as a Tolerance Type.
Advancement Approval Required	(Optional) Select this check box if approval is necessary before step increases are awarded. When selected you must review and manually approve workers in order for the step advancement batch process to pick them up and perform the step and compensation updates. To manually approve the advancement, use the Approve Employees to Advance page (Workforce Administration, Labor Administration, Wage Progression). If you select this check box, the Days Within: field becomes available.
Days Within:	To present workers for approval prior to their estimated advancement date, enter the number of days prior to that date. The workers will be set to Almost Qualified status during the Update Wage Progression Qualification sub-process. You can then approve them early, if appropriate. This can facilitate timely processing of the step and rate increase and its recognition by payroll.
Job Action:	Select a job action to be assigned by the advancement process when it inserts a new job row. Values come from the Actions page.
Reason:	Select a related reason code from the values which come from Action Reason page.

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

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

Wage Progression Steps - Time in Step tab

Step	Enter the numerical value for the Step IDs in the order in which the wage progression rules should be generated.
Step Description	Enter a description for the step in this freeform field.
Time Required in Step	Enter the amount of time that the worker must remain in the step before they can be advanced.
Units	The values are display only and are automatically generated depending on the Increment Type field.

Wage Progression Steps - Increase tab

Increase Amount	Enter the amount for the rate increase for this wage progression rule. The increase parameter will vary depending on the calculation method. For example, if the method is percent of grade maximum, the value will be a
------------------------	--

percent or if the method is incremental amount, the value will be an amount.
The currency code of the Salary Plan applies.

Wage Progression Steps - Time Limits tab

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

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

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

Maximum Leave Hours For Elapsed Time based rules: Enter the maximum number of leave hours that are allowed at each step.
You must also define and associate a Payroll for North America Special Accumulator in the Leave Accumulator field.

Applying Wage Progression Rules to Salary Plans

Access the Salary Step Components page.

The screenshot displays the 'Salary Step Components' page. At the top, there are tabs for 'Salary Grade Table', 'Categorization Defaults', 'Salary Step Components' (selected), and 'Grade Advance Criteria'. Below the tabs, the 'SetID' is 'SHARE' and the 'Salary Administration Plan' is 'KUH1 Professional Workers'. The 'Salary Grade' is '1' and 'Standard Hours' are '40.00'. The 'Salary Basis' is 'Annl Basis'. The 'Effective Date' is '01/01/1980' and the 'Status' is 'Active'. The 'Description' is 'WP Plan KUH1 Grade 1' and the 'Increment Type' is 'Wks Based'. A 'Regenerate Steps' button is visible. Below this, the 'Salary Step' section shows 'Step: 1' and 'Step Description: Amt Inc Elap Wks Appr Step 1'. The 'Currency' is 'USD'. A table titled 'Salary Components' lists components with columns: 'Rate Code', 'Seq', 'Details', 'Comp Rate', 'Currency', 'Frequency', 'Percent', 'Rate Code Group', and 'Points'. One component is listed: 'NAHRLY' with 'Seq' 0, 'Comp Rate' 21.000000, and 'Currency' USD. A 'Totals' section at the bottom shows rates: 'Hourly Rate' 21.000000, 'Daily Rate' 168.000, 'Monthly Rate' 3,640.00, and 'Annual Rate' 43,680.00. The page also shows a location indicator for 'Australia'.

Salary Step Components page

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

Salary Grade

Spec Accum (special accumulator)

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

Generate Steps or
Regenerate Steps

Click this button to calculate or recalculate the salary steps per the salary plan's wage progression rules. Click the View All in the Salary Step group box to review the generated step details.

The button changes to Regenerate Steps once you have saved the page.

Important! You should regenerate steps when you change the wage progression rule.

Wage Progression Rule

Click this link to access the Wage Progression Rules page where you can view wage progression rules associated with this salary grade.

Salary Step

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

**Hours to Next Step
Increment**

Displays the number of hours that the worker must accumulate in this step before being eligible for the next step increment.

CHAPTER 5

Administering Seniority Pay

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

Understanding the Update Seniority Pay Process

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

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

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

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

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

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

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

Administering Seniority Pay

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

To administer seniority pay:

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

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

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

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

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

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

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

Prerequisites

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

See Also

[Chapter 2, “Setting Up Administer Compensation,” Defining Rate Codes, page 7](#)

Pages Used to Administer Seniority Pay

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” PER044 - Multiple Seniority Components – Basic Report

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 you are adding or correcting.

Don't Absorb Changes

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

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

Process By

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

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

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

Rate Code

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

Group ID

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

Running the Update Seniority Pay Process

To run the Update Seniority Pay process:

1. Run the Application Engine process HR_CMP013.
The Application Engine process finds the workers who meet the criteria specified in the run control parameters, and loads their information into a temporary table.
2. Run the SQR report CMP013 to review the information loaded by the Application Engine process.
3. Run the Application Engine process HR_CMP013_CI to load the information to the worker Job Data pages.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, “Setting Up Base Compensation and Budgeting,” Defining Salary Plan Characteristics

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Group Definitions and Security,” Setting Up Group Security

Enterprise PeopleTools 8.45 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 workers.

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

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

Running the Update Seniority Eligibility Process

To run the Update Seniority Eligibility process:

1. Run the Application Engine process HR_CMP014.
The Application Engine process finds the workers who meet the criteria specified in the run control parameters, and loads their information into a temporary table.
2. Run the SQR report CMP014S to review the information loaded by the Application Engine process.
3. Run the Application Engine process HR_CMP014_CI to load all the information to the worker Job Data pages.

See Also

Chapter 5, “Administering Seniority Pay,” Updating Seniority Pay Components, page 34

CHAPTER 6

Refreshing Worker Compensation Information

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

Understanding Compensation Defaults

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

Changing a Compensation Package

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

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

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

Recalculating Compensation

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

Understanding Salary Plan Compensation Defaults

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting

Setting Up Salary Plan Defaults

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

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

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

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

- Assign a salary plan directly to a worker on the Job Data - Salary Plan page.

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

- Associate a salary plan with a labor agreement on the Salary Plan Grades page.
- Associate a salary plan with a labor agreement directly to a worker on the Job Data - Salary Plan page.

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

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

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

Salary Administration Plan Defaulting at Hire

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

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

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

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

Salary Administration Plan Defaulting After Hire

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

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

If the grade and step are valid for the new location's salary plan, the system enters the new salary plan on the Job Data - Salary Plan page.

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

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

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

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

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

Refreshing Worker Compensation Packages

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

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

Understanding the Refresh Employee Compensation Process

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

The Refresh Employee Compensation process:

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

See Also

Chapter 3, “Defining Compensation Rates and Rules-Driven Component Defaulting,” Understanding Rules-Driven Component Defaulting, page 15

Page Used to Refresh Worker Compensation Packages

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

Running the Refresh Employee Compensation Process

Access the Refresh Employee Compensation page.

Refresh Employee Compensation

Run Control ID: PS1 [Report Manager](#) [Process Monitor](#) **Run**

Language: English

Report Parameters

As Of Date: 10/01/2004 ☒ Add new effective date ☐ Correction on current Info.

☐ Update Future Rows

☐ Don't Absorb Changes

Process By

☒ Group ID ☐ All

Group ID: KUALLUS All US Employees

First 1 of 1 Last

Refresh Employee Compensation page

Report Parameters

As Of Date and Correction on current Info.

Select to update data and override information in worker records. The system updates the record that is effective as of the date you enter.

As Of Date and Add new effective date

Select to insert a new effective-dated row using As Of Date as the new effective date. For example, you enter *01/01/2003* in As of Date and run the process. The process inserts a new Job row with an effective date of 01/01/2003.

If a record already exists with this effective date, the system inserts a row with the date and a sequence number.

Update Future Rows

Select to update all existing future effective-dated rows, in addition to the effective-dated row already being added or corrected. (A future effective-dated row is one that has an effective date later than the As Of Date you specify.)

Don't Absorb Changes

Select to leave absorbable rate codes unchanged when the defaulted salary amount changes.

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

Process By

Group ID

Select to process by group ID. The update process selects all workers with the group ID you specify.

All

Select to process all workers to whom you have security access.

Running the Refresh Employee Compensation Process and Report

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

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, “Setting Up Base Compensation and Budgeting,” Defining Salary Plan Characteristics

CHAPTER 7

Using Population Management

This chapter provides an overview of population management and discusses how to create and maintain population trees.

Understanding Population Management

With population management, you can define and maintain trees of workers that represent various organizational hierarchies. These hierarchical, graphical representations are *snapshots* of your organization at a given point in time. In other words, these trees are not “dynamic.” These population trees provide a flexible way to manage and manipulate compensation-related information. By using this functionality, you can manipulate worker populations for specific business purposes, such as creating group budgets and applying group and merit increases.

When using population management, remember that:

- Workers can reside on multiple nodes.
- You can reorganize the hierarchy by deleting nodes, adding nodes, moving nodes, or replacing workers on a node with another worker.
- You can copy population trees by using the Save Tree As button.

When you have created a population tree, you can:

- View information that is associated with each worker.
- View job information by directly linking to the Job Data component for a specific worker.
- Apply filters to the population tree using queries designed with the Query Builder tool.
- Compare two population management trees.
- Use the tree to build groups.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, “Budgeting and Planning Salary Increases”.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up and Working with Groups”

Prerequisites

To use population management, you must also use:

- PeopleSoft Human Resources as your main system for worker demographic information.

- Manage Base Compensation and Budgeting.
- PeopleSoft Tree Manager.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Variable Compensation

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Group Definitions and Security”

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Tree Manager

Common Elements Used in This Section

Pre-Attribute HTML	Enter any formatting HTML.
Post-Attribute HTML	Enter any formatting HTML.
Save Tree	Click if you want to save the tree.
Save Tree As	Click if you want to create a copy of the tree.

Creating and Maintaining Population Trees

This section provides an overview of creating and maintaining population trees and discusses how to:

- Create population management trees.
- Maintain population trees.
- Find workers on population trees.
- Define tree views.
- Create groups.
- View base compensation.
- View group budgets.
- Compare population trees.
- Set group security by operator.

Pages Used to Create and Maintain Population Trees

Page Name	Object Name	Navigation	Usage
Manage Populations	WCS_POP_MGT_PG	Set Up HRMS, Product Related, Compensation, Population Management, Manage Populations	Create, revise, or view population management tree.
Tree View Setup	WCS_ITER_SETUP_PG	Set Up HRMS, Product Related, Compensation, Population Management, Define Tree Views	Define tree views.
View Base Compensation	WCS_INQ_SAL_MT_PG	Set Up HRMS, Product Related, Compensation, Population Management, View Base Compensation	View the base compensation for any member of the tree. Click the name of a manager to view compensation information for all his direct reports. Click an individual's name to view just his or her compensation.
View Group Budgets	WCS_INQ_SAL_MT_PG	Set Up HRMS, Product Related, Compensation, Population Management, View Group Budgets	View the group budget for any group created from the tree. Click the name of the manager that was used to create the group. The system displays the group budget details.
Compare Populations	WCS_CMPR_TREE_PG	Set Up HRMS, Product Related, Compensation, Population Management, Compare Populations	Compare two population trees.
Group Security by Operator	WCS_POP_GRP	Set Up HRMS, Product Related, Compensation, Population Management, Group Security by Operator	Define and view operator security for groups.

Creating Population Management Trees

Access the Manage Populations page, and click Add a New Value.

Manage Populations

*Tree Name

PAYROLL FOR ADMIN

*Description

Payroll for Admin Assts

*Effective Date

10/08/2004

*EmplID

KU0007

Betty Locherty

Empl Rcd Nbr

*Hierarchy Type

Dept Manager

Create Tree

Manage Populations page: Add mode

To create a population, you select the worker that will be the top of the population tree and the specific type of direct-reporting relationship that you want to use. After entering all required information, click the Create Tree button. The system will create the tree and display it. You can either save the tree as is, or save it after applying any reorganization operations.

Important! Creating the tree does not automatically save it. You must save it before leaving the page.

Tree Name, and Description Enter a name and description for the population tree.

Effective Date Enter the effective date for the population tree.

EmplID (employee ID) and **Empl Rcd Nbr** (employee record number) Select the values for the worker.

Hierarchy Type Select the type of direct reporting relationship that you want to use to build the tree. Values are:

- *Dept Manager*
- *Partial Position Mgt - Dep Mgr*
- *Partial Position Mgt - Sup ID*
- *Reports to Position*
- *Supervisor ID*

Create Tree Click this button to create the population management tree.

Maintaining Population Trees

Access the Manage Populations page.

Manage Populations

▼ Tree Settings

Tree Name: KU0007ORG **Effective Date:** 01/01/2003

Description: Betty Locherty Organization

Tree View: DEFAULT Default Tree Viewer

Eligibility Query:

▼ Tree Content

Empl ID Rcd **Find**

- Betty Locherty (KU0007)** ▾
 - ☐ **Tom Newman (KOMTX001)** 290000 ▾
 - ☐ **Sandy Nickels (KOMTX002)** 310015 ▾
 - ☐ **Kathy O'Brien (KOMTX003)** 290085 ▾
 - ☐ **Bryan Odell (KOMTX004)** 290035 ▾
 - ☐ **Diane Palmer (KOMTX005)** 290060 ▾
 - ☐ **Andrew Pierce (KOMTX006)** 290065 ▾
 - ☐ **John Quinn (KOMTX007)** 290105 ▾
 - ☐ **Michael Rhodes (KOMTX008)** 290105 ▾
 - ☐ **Annette Thompson (KOMTX009)** 310005 ▾
 - ☐ **Jeremy Sands (KOMTX010)** 570000 ▾
 - ☒ **Rosanna Channing (KU0046)** 600085 ▾
 - ☒ **Sylena Tyler (KU0050)** 600085 ▾

Manage Populations page

Tree Settings

Description

Displays the name of the tree.

Tree View

Select the tree view. Values come from the Define Tree Views page.

Eligibility Query

Select a specific query to highlight the workers who meet the eligibility criteria. Ineligible members and eligible members who are not on the tree will also be displayed and highlighted.

Remove Elig

Click this link to remove the eligibility query. The tree reverts to its original state.

Tree Content

Empl ID and Rcd

When the tree is large, you can find a specific worker using these fields. Enter the Employee ID and record number of the worker for whom you want to search and click Find. The system will display the tree beginning with that worker's manager as the root node.

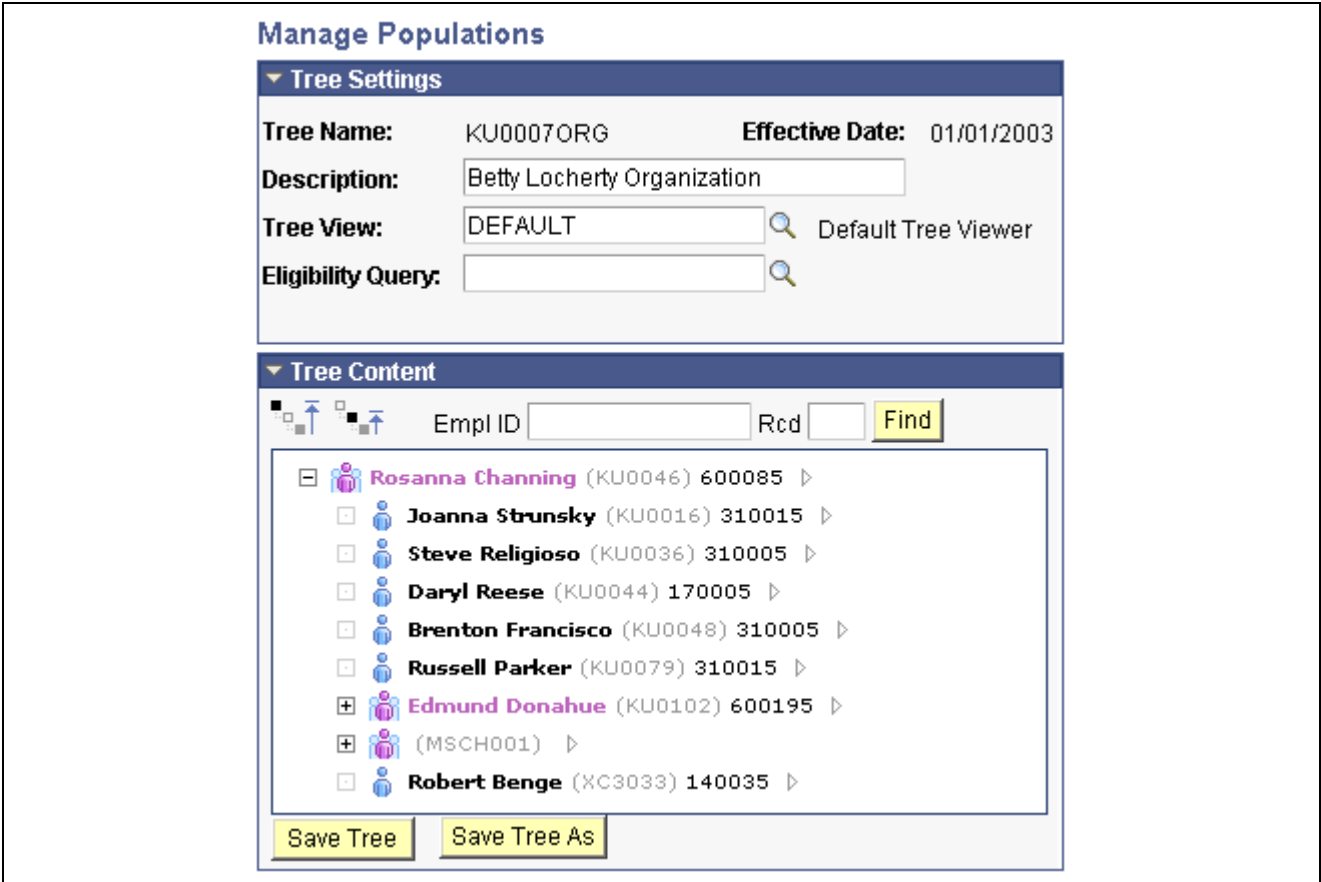
(Context Menu)

Click this icon to access the context menu for the current node.

If workers do not have proper information so that they can be placed within the hierarchy, they are placed on a node indicating that they are missing information.

Finding Workers on Population Trees

Access the Manage Populations page.



Manage Populations

Tree Settings

Tree Name: KU0007ORG Effective Date: 01/01/2003

Description: Betty Locherty Organization

Tree View: DEFAULT Default Tree Viewer

Eligibility Query:

Tree Content

Empl ID: Rcd: Find

- [-] Rosanna Channing (KU0046) 600085 ▸
 - [-] Joanna Strunsky (KU0016) 310015 ▸
 - [-] Steve Religioso (KU0036) 310005 ▸
 - [-] Daryl Reese (KU0044) 170005 ▸
 - [-] Brenton Francisco (KU0048) 310005 ▸
 - [-] Russell Parker (KU0079) 310015 ▸
 - [+] Edmund Donahue (KU0102) 600195 ▸
 - [+] (MSCH001) ▸
 - [-] Robert Benge (XC3033) 140035 ▸

Save Tree Save Tree As

Finding workers on a population tree

To find workers on a population tree:

1. Find a tree.
2. Enter the Empl ID and Rcd (optional).
3. Click Find.

The system returns the name of the worker as the root of the tree.

In this screenshot, note that new root of tree is Rosanna Channing and she is the manager of Daryl Reese. The icons in the Tree Content box can be used to navigate up the tree.



The first icon will take you back to the original root (Betty Locherty), and the second one will take you up one level only.

Note. The find and navigation operations do not change the actual root node of the tree.

Defining Tree Views

Access the Define Tree Views page.

Define Tree Views

Tree View ***Iterator Class**

Tree View Descr ***Action Class**

Node Configuration Find | View All

Node Type + -

Pre-attribute HTML **Label Separator**

Post-Attribute HTML **Source Separator**

Icon Name

Disabled Icon Name

Display Data Customize | Find | View All | First 1-3 of 3 Last

Content **Format** + -

	*Source ID		Description	Column No.	Inactive Flag		
1	PERSON_NAME		Person Name	1	☐	+	-
2	EMPLID		Employee ID	2	☐	+	-
3	JOB CODE		Job Code	3	☐	+	-

Tree View Setup page (1 of 2)

Menu Actions Customize | Find | View All | First 1-13 of 13 Last

	Menu Action		*Description	Column No.		
1	ADD_CHILD		Add Child	5	+	-
2	CUT		Cut	10	+	-
3	PASTE		Paste as Child	20	+	-
4	VACANT_REPLACE		Replace with Vacant	22	+	-
5	REPLACE_NODE		Replace From List	23	+	-
6	REPLACE_NODE_CLIPBOARD		Replace From Clipboard	24	+	-
7	REMOVE_NODE		Delete Node	25	+	-
8	SPACER		Spacer	30	+	-
9	RESET_ROOT		View as Root	40	+	-
10	SPACER		Spacer	50	+	-
11	GB_SINGLENODE		Group Build - Single Node	60	+	-
12	GB_BRANCH		Group Build - Branch	70	+	-
13	SPACER		Spacer	80	+	-

Page Links Customize | Find | View All | First 1-2 of 2

	Link Name	*Description	New Window	Menu Name	Menu Bar Name	Item Name	Page Name	Navigation Record
1	GROUP	View Group	☒	WCS_POP_GF	USE	WCS_POP_GROL	WCS_POP_GRC	WCS_POP_GRP_T
2	JOB	Job information	☒	ADMINISTER_V	USE	JOB_DATA	JOB_DATA1	JOB

Tree View Setup page (2 of 2)

The information that is displayed on each node of a population tree is determined by the tree view. The system-defined DEFAULT view shows the worker name, employee ID and job code. You should not modify the definition of the DEFAULT view. This view is used when you initially create a tree.

However, you can create additional custom views to display other worker-related information.

When creating a tree view, you can define and control the following aspects of the tree:

- Fonts and colors of icons for each node type.
- Specific labels and data items that appear on the node, with a specific separator between them.
- Available actions when you click the context menu for each node type.
- Available links to related components in the menu for each node type.

Tree View and Tree View Description	The name and description of the configurable view.
Iterator Class	Enter the name of the PeopleSoft application class (AppClass) module that contains the definitions that are required by this view.
Action Class	Enter the name of the PeopleSoft application class (AppClass) module that contains the definitions that are required to support the menu actions that are available in this view.

Node Configuration

Node Type	Each population tree has the following types of nodes: • <i>SYSTEM_NODE</i>: This node is used by population management logic to manage displays. This is display-only and cannot be changed. • <i>ROOT</i>: This node is at the top of the tree. It is used for the worker who is used to create the tree. • <i>MANAGER</i>: This node is used when a worker is a manager (parent node) and will have one or more reporting workers (child nodes). • <i>INDIVIDUAL</i>: This is the standard node that identifies one worker. • <i>EXCLUSIVE_NODE</i>: This node is used only within the Compare Trees component. It represents a node that exists in the current tree but does <i>not</i> exist in the other tree. • <i>MISSING_NODE</i>: This node is used only within the Compare Trees component. It represents a node that does not exist in the current tree but exists in the other tree. • <i>MOVED_NODE</i>: This node is used only within the Compare Trees component. It represents a node that exists in both trees, but is located in different positions in each tree and has a different parent node in each tree.
------------------	---

- *VACANT_NODE*: This node represents a position in the tree that does not have a worker assigned to it.

Icon Name	Enter the name of the icon that will be used to highlight this node when it is active.
Disabled Icon Name	Enter the name of the icon that will be used to highlight this node when it is inactive.
Label Separator	Enter any character that will be used to encapsulate the label for the data item.
Source Separator	Enter any character that will be used to encapsulate the data item that is represented by the source ID.

Display Data - Content tab

This section enables you to define the data items that will appear on each node. The data items are represented by source IDs. For each data item, you can select the ordering and formatting that will determine how the information is displayed on the node.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, “Using Configurable Matrices”.

Source ID	Enter the name of the source ID.
Column No. (column number)	Enter the order in which this item should appear on the node.

Display Data - Format tab

Show Label	Select to display the label for the source ID on the node.
Bold	Select if you want the label text to appear in bold.

Menu Actions

This group box enables you to define the actions that will be available in the menu for this node type.

Menu Action	Enter the menu action. These values are system-defined.
--------------------	---

Note. This name will not appear on the menu.

Description	Enter a short description. This will appear on the menu.
Column No. (column number)	Enter the order in which this item will appear on the menu

Menu Action/Navigation	Description
ADD_CHILD	Add Child: Add a new child node to the current node. You have to select the worker that will be the child node.
CUT	Cut: Cut a worker node and move into the clipboard

Menu Action/Navigation	Description
PASTE	Paste as Child: Paste the node from the clipboard as a child of the current node.
VACANT_REPLACE	Replace with Vacant. Remove the worker from the current node.
REPLACE_NODE	Replace From List. Replace the worker on the current node with one that you select using a search page.
REPLACE_NODE_CLIPBOARD	Replace From Clipboard
REMOVE_NODE	Delete Individual Remove the current node from the tree
SPACER	Spacer. Used as a separator between actions and links on the menu.
RESET_ROOT	View as Root. Redraw the tree with the current node as the root node.
GB_SINGLENODE	Group Build - Single Node
GB_BRANCH	Group Build - Branch
SPACER	Spacer

Note. When you cut a node, the tree view does not change. However when you paste that node in another position, the tree will be redrawn appropriately. In addition, when you replace a node with another worker, the new worker gets added to the bottom of the manager's child nodes list.

After any operation, you must save your changes. The menu actions do not automatically save your changes.

Page Links

This section enables you to define links that will be available to the user when they access the menu for this node type.

Link Name and Description	Enter the name and description of the link.
New Window	Select if you want the system to open a new browser window to display the new page.
Menu Name	Enter the name of the PeopleSoft menu to invoke.
Menu Bar Name	Enter the name of the menu.
Item Name	Enter the name of the menu item.
Page Name	Enter the name of the page to display.
Navigation Record	Enter the name of the record to display.

Viewing Base Compensation

Access the View Base Compensation page.

Tree Content

Empl ID Rcd Find

- Rosanna Channing (KU0046) 600085 ▾
 - Joanna Strunsky (KU0016) 310015 ▾
 - Steve Religioso (KU0036) 310005 ▾
 - Daryl Reese (KU0044) 170005 ▾
 - Brenton Francisco (KU0048) 310005 ▾
 - Russell Parker (KU0079) 310015 ▾
 - Edmund Donahue (KU0102) 600195 ▾

Save Tree Save Tree As

Base Salary

Employee ID KU0046 USD

Empl Rcd Nbr

Employee Rosanna Channing

Annual Rate 60,008.00

Department 10000

Job Code 600085

Salary Grade 006

Payroll Status Active

USD

Name	Annual Rate	Currency Code
Joanna Strunsky	26,000.00	USD
Steve Religioso	120,016.00	USD
Daryl Reese	26,000.00	USD
Brenton Francisco	26,000.00	USD
Russell Parker	26,000.00	USD
Edmund Donahue	48,006.48	USD
Total Annual Salaries	272,022.48	

View Base Compensation page

To view base compensation for a tree:

1. Find a tree.
2. Click a manager to access this page, or enter the Empl ID and Rcd number (optional).

Click the name of a worker to access other view options such as base salary.

This page enables you to view base compensation information for an individual or for a manager and all direct reports of the manager. Click the name of the worker or the manager, and the system displays appropriate compensation information next to the node. You can find and navigate to the worker or manager whom you want and then click the name to see the compensation information.

Viewing Group Budgets

Access the View Group Budgets page.

This page works similar to the View Base Compensation page.

Important! To view compensation for the group budget, you must run the entire Group Budget and Group Increase processes.

To view group budget information:

1. Find a tree.
2. Click the manager that was used to create the group.

Note. You must click the name of a *manager* to view group budget information.

This page enables you to view group budget information for an individual or for a manager and all direct reports of the manager. Click the name of the worker or the manager, and the system displays appropriate budget information next to the node. You can find and navigate to the worker or manager whom you want, and then click the name to see the compensation information.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, “Budgeting and Planning Salary Increases”

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, “Defining, Assigning, and Approving Merit Increases”

Comparing Population Trees

Access the Compare Populations page.

Compare Populations

Tree Settings

Tree Name: JLEEORG Effective Date: 10/27/2004

Description: Jeanette Lee

Tree View: DEFAULT Default Tree Viewer

Eligibility Query:

Tree Content

Empl ID Rcd Find

- Jeanette Lee (KU2008) ▸
 - Eduardo Campos (KU2009) 600035 ▸
 - Catherine Richards (KU2013) 420005 ▸
 - Juliette Campos (KU2014) 170005 ▸
 - Patrick Cook (KU2015) 170005 ▸
 - Katrina Volowski (KU2016) 800000 ▸
 - Suzanne Pierce (KU2020) 770005 ▸
 - Anthony Bracco (KU2017) 420025 ▸
 - Anand Gundu (KU2018) 770005 ▸
 - Anne Lowe (KU2019) 770020 ▸

Save Tree Save Tree As

***Target Tree Name** JLEEORG_2

***Target Effective Date** 10/27/2004

Compare Trees View Target Tree

Compare Populations page

***Target Tree Name** and ***Target Effective Date** Select the name of the tree and the effective date of the tree which you want to compare.

Compare Trees Click to compare the trees.

View Target Tree Click to view the target tree before performing the comparison.

Viewing the Target Tree — Example

When preparing to compare trees, you first retrieve one tree, and then enter the name and effective date of the target tree you want to use for comparison. In the previous page shot, JLEEORG is the base tree and it is compared to JLEEORG_2. The results will indicate how JLEEORG differs from JLEEORG_2.

After you click View Target Tree, the system opens a new browser window, and displays the compare tree page using that tree as the base tree.

Compare Populations

Tree Settings

Tree Name:	JLEEORG_2	Effective Date:	10/27/2004
Description:	Jeanette Lee Modified Tree		
Tree View:	DEFAULT	Default Tree Viewer	
Eligibility Query:			

Tree Content

Empl ID Rcd Find

- [-] **Jeanette Lee** (KUZ008) ▸
 - [+] **Eduardo Campos** (KUZ009) 600035 ▸
 - [-] **Catherine Richards** (KUZ013) 420005 ▸
 - ☐ **Juliette Campos** (KUZ014) 170005 ▸
 - ☐ **Patrick Cook** (KUZ015) 170005 ▸
 - ☐ **Katrina Volowski** (KUZ016) 800000 ▸
 - ☐ **Betty Locherty** (KU0007) 420050 ▸
 - [-] **Anthony Bracco** (KUZ017) 420025 ▸
 - ☐ **Anand Gundu** (KUZ018) 770005 ▸
 - ☐ **Anne Lowe** (KUZ019) 770020 ▸
 - ☐ **Suzanne Pierce** (KUZ020) 770005 ▸

Save Tree
Save Tree As

Viewing the Target Tree

In this screenshot of the target tree (JLEEORG_2), note that there is now a new worker (Betty Locherty) under Catherine Richards. Also note that Suzanne Pierce is under Anthony Bracco in this tree.

Viewing the Comparison Results

Click the Compare Trees button.

Compare Populations

Tree Settings

Tree Content

Empl ID Rcd **Find**

- [-] **Jeanette Lee** (KUZ008) ▾
- [-] **Eduardo Campos** (KUZ009) 600035 ▾
- [-] **Catherine Richards** (KUZ013) 420005 ▾
 - ☐ **Juliette Campos** (KUZ014) 170005 ▾
 - ☐ **Patrick Cook** (KUZ015) 170005 ▾
 - ☐ **Katrina Volowski** (KUZ016) 800000 ▾
 - ☐ **Suzanne Pierce** (KUZ020) 770005 ▾
- [-] **Anthony Bracco** (KUZ017) 420025 ▾
 - ☐ **Anand Gundu** (KUZ018) 770005 ▾
 - ☐ **Anne Lowe** (KUZ019) 770020 ▾
- ☐ **Exclusive Nodes**
- [-] **Missing Nodes**
 - ☐ **Betty Locherty** KU0007 ▾
- [-] **Moved Nodes**
 - ☐ **Suzanne Pierce** KUZ020 ▾

Save Tree **Save Tree As**

***Target Tree Name**

***Target Effective Date**

Compare Trees **View Target Tree**

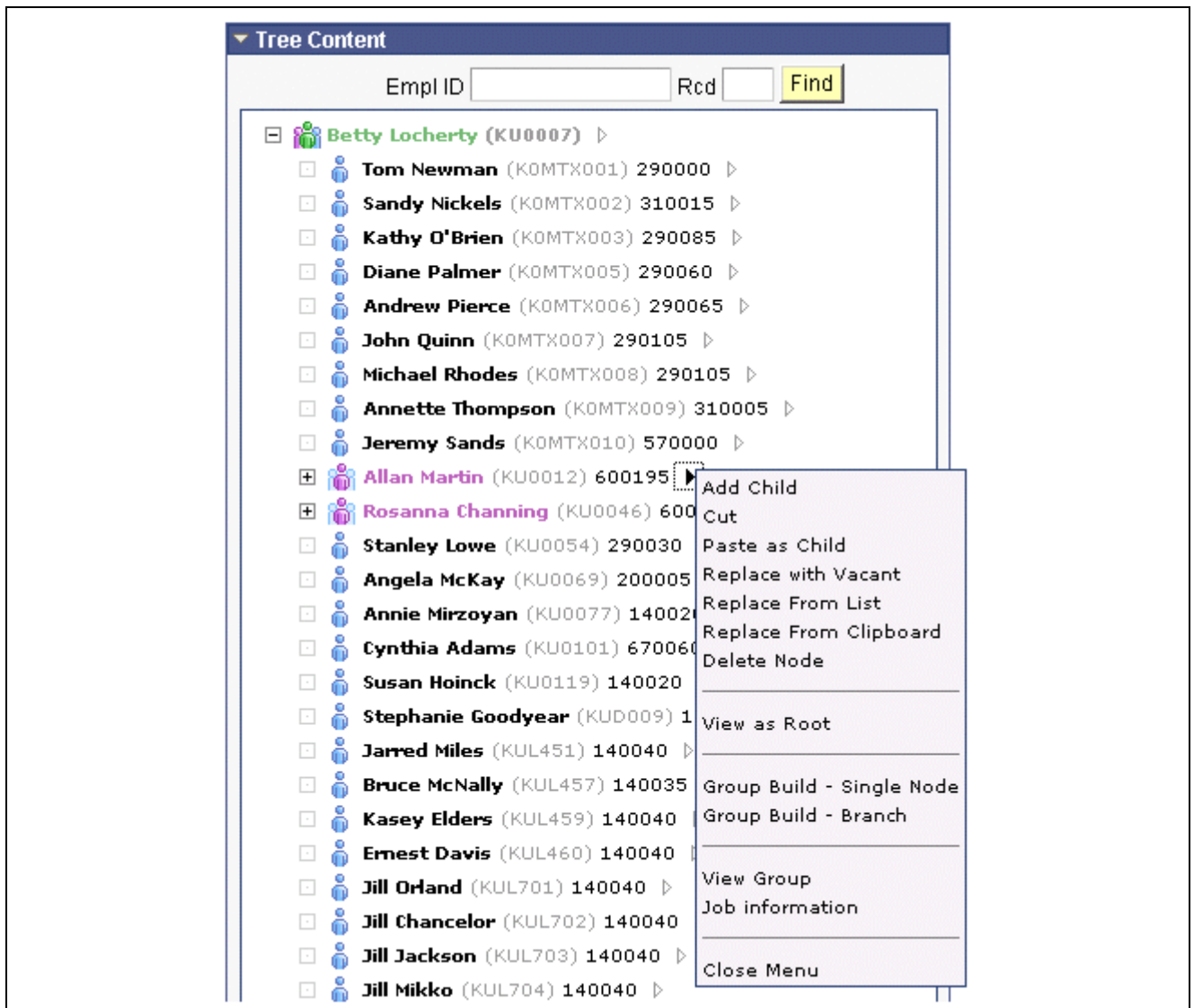
Viewing the tree comparison results

Open the Missing Nodes and Moved Nodes sections of JLEEORG. Note that the page shows Betty Locherty is missing from JLEEORG, and Suzanne Pierce has moved to JLEEORG_2 .

However, if JLEEORG_2 had been used as the base tree and compared to JLEEORG, then we would have seen the same Moved Node, but Betty Locherty would appear as an Exclusive Node rather than a Missing Node.

Creating Groups

Access the Manage Populations page.



Tree Content group box and context menu options

Population management can be used to build groups of workers in two ways:

- **Single Node:** The system creates a group consisting only of workers directly reporting to the manager node that was used.

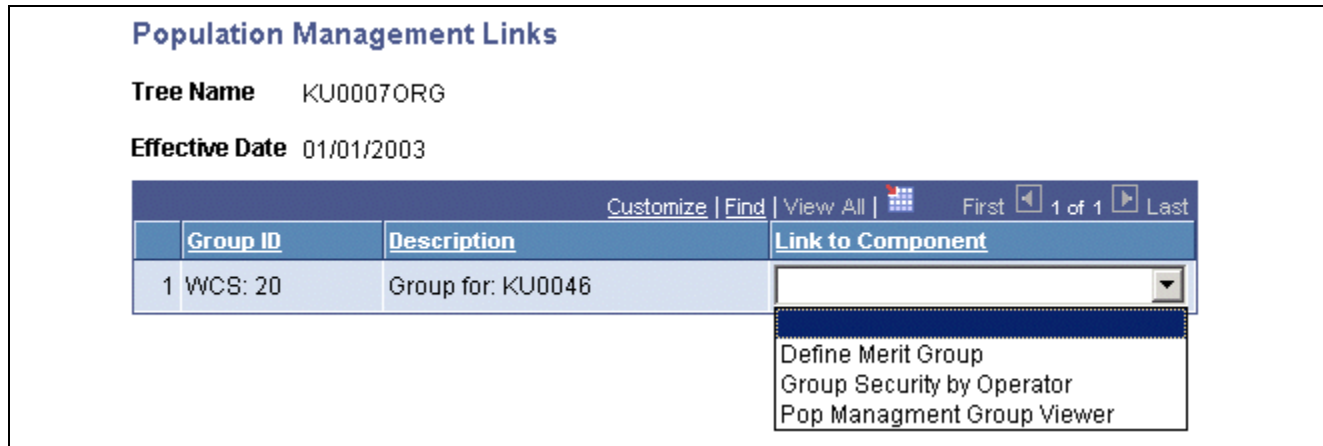
Note that the manager will not be in the group.

- **Branch:** The system creates groups for every manager reporting to the current manager and one group consisting of all workers directly reporting to the current manager.

For example in the previous screenshot, if you select *Group Build - Single Node* for Betty Locherty, you will get one group consisting of everyone under Betty. If you select *Group Build - Branch*, you will get three groups: one for Betty, one for Rosanna, and one for Allan. Note that Rosanna and Allan will appear in Betty's group. Betty will not appear in any of the three groups.

To create a group, select a worker or the manager, click the Context Menu and select either *Group Build - Single Node* or *Group Build - Branch*.

This screenshot illustrates the results after selecting the *Group Build - Single Node* option:



Population Management Links page: using Group Build - Branch option

When you select a group build menu item, you will get a new browser window with a page that shows the group that was built. The group ID is automatically generated as WCS, followed by a unique sequence number. The group description is automatically generated with the employee ID of the manager that was used to create the group. From this page you can link to related components as shown.

The manager of the new group that is created will be set to the manager that was used to create the group. The approver will be set to the manager of the manager. For example, if you build a group with Rosanna Channing, the manager of the group will be Rosanna Channing and the Approver will be Betty Locherty.

You can use these groups directly in the group increase and merit increase compensation processes.

Unlike the Group Build process, the Group Definition pages for these groups have no criteria in them because the groups were built directly from the population tree.

Important! Do not use the Group Definition pages to view population management group members because the system will display all workers in the database.

Link to Component

Select one of these values to link to:

Group Security by Operator: Define and view security for the group.

Pop Management Group Viewer: View information that is associated with group members.

Setting Group Security by Operator

Access the Group Security by Operator page.

Group Security by Operator

Process Name Population Management

Group Security Find | View All First 1 of 1 Last

Effective Date 06/17/2004

User Security Find | View All First 1 of 1 Last

***User ID** P8

Component Find | View All First 1-5 of 19 Last

GB_GRP_DEFN_TABLE	☐ Allow Direct Link
GB_GRP_DFT_TBL	☐ Allow Direct Link
GB_GRP_SEC_TABLE	☐ Allow Direct Link
GROUP_INCR_BUDGE	☐ Allow Direct Link
RUNCTL_CMP006	☐ Allow Direct Link

Group Security by Operator page

This page defines to which components an operator will automatically be given access for groups that are created by Population Management.

User Security

User ID

Select the operator whose security access you want to set.

Component Name

Select the name of a component to set the operator's security access.

Allow Direct Link

Select if you want the operator to have direct access to this component from the Link to Component drop down on the Population Management Links page.

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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
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 split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

	PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
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.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
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.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
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 activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. 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).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> .
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
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. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
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.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
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.
collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
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.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
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.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
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 PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. 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.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
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.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i>.
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
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.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollout structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.

document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are 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 ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects 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.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
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.

financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
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.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
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.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
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.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
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.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (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	Metastings are special expressions included in SQL string literals. The metastings, 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	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page 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.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (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.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan 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.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
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.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
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 a Structured Query Report (SQR), a COBOL or Application Engine 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	A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.
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.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.
product line	The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i>. See <i>record input VAT flag</i>.
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
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.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

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.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
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.
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.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
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.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
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.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
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 key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
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.
speed key	See <i>communication key</i> .
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.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
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.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
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 time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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.
third party	A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
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.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
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 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.
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.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.
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.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
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.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
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.
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.

XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . 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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

A

- additional documentation x
- administer compensation
 - business processes 1
 - getting started 1
 - implementing 2
 - integrating 2
 - setting up 5
 - setting up rate codes 6
 - understanding 1, 5
- application fundamentals ix
- Australia, PeopleSoft Enterprise Salary Packaging for 10

B

- base compensation, viewing 54
- base pay, definition xx
- business processes 1, 33, 36

C

- classes, *See* rate code classes
- comments, submitting xiv
- common elements xv
- Comp Rate Code Table - Combination Rules page 6, 12
- Comp Rate Code Table page 6, 7
- Compare Populations page 47, 56
- compensation defaults 39
- compensation packages
 - changing using default values 39
 - recalculating without using default values 39
 - refreshing 41
 - setting up salary plan defaults 40
 - understanding defaults 40
- compensation packages, definition xx
- compensation rate codes, *See* rate codes
- compensation rates 16
- component defaulting rules
 - assigning rate codes 20
 - associating values with criteria 20
 - creating criteria 19
 - defining 18
 - example 15
 - specifying fields to use 17

- understanding 15
- contact information xiv
- Criteria page 17, 19
- cross-references xiii
- Customer Connection website x

D

- Defaulting Options page 17
- defaulting rules, association with rate codes 12
- Define Tree Views page 47, 51
- Define Wage Progression Rule page 25, 26
- Definition page 17, 18
- documentation
 - printed x
 - related x
 - updates x

E

- earnings code, defined 9

F

- fields to use with component defaulting rules 17
- frequency, definition xx

G

- glossary 63
- group budgets, viewing 55
- Group Security by Operator page 47, 60
- groups, *See* rate code groups

I

- integrations 2

J

- Japan, calculating education level
 - age-adjusted pay 11
- job code component, definition xx
- job code, definition xx
- job compensation rate, definition xx

M

- Manage Populations page 47, 48, 58

MMA Partners x
Multiple Seniority Components page 34

N

non-base pay, definition xx
notes xiii

P

pay components, definition xx
PeopleBooks
 ordering x
PeopleCode, typographical
 conventions xii
PeopleSoft application fundamentals ix
percentage increase of base pay 13
percentage rate codes 13
population management
 creating and maintaining population
 trees 46
 prerequisites 45
 understanding 45
population trees
 comparing 56
 creating and maintaining 46
 creating groups 58
 defining views 51
 finding workers 50
 maintaining 48
 setting group security by operator 60
 viewing base compensation 54
 viewing comparison results 57
 viewing group budgets 55
prerequisites ix
 population management 45
 seniority pay 34
printed documentation x
processes, Update Seniority Eligibility 37

R

rate code classes 6
Rate Code Classes page 6
rate code groups 13
 definition xx
 understanding 13
Rate Code Groups page 14
Rate Code page 17
rate code types, definition xx
rate codes

assigning to component defaulting
 rules 20
Comp Rate Code Table - Combination
 Rules page 6
Comp Rate Code Table page 6
creating rate code classes 6
creating seniority rate codes 10
defining 7
defining groups of 13
definition xx
Rate Code Classes page 6
Seniority Pay - Comp Rate Code Table
 page 6
 setting up 6
 viewing associated defaulting rules 12
Rate Codes page 17, 20
Refresh Employee Compensation
 (HR_CMP015) report 43
Refresh Employee Compensation page 42
Refresh Employee Compensation
 process 41
related documentation x
reports, Refresh Employee Compensation
 (HR_CMP015) 43
rules-driven component defaulting
 defining 16
 executing 39
 understanding 15
rules-driven pay components,
 definition xx

S

salary plan defaults, setting up 40
Salary Plan Table page 25
salary step component, definition xx
Salary Step Components page 25, 30
seniority
 defined 33
 eligibility 36
seniority eligibility process 37
seniority pay
 administering 33
 business processes 33, 36
 definition xx
 ensuring worker eligibility for 36
 prerequisites 34
 understanding 33
 updating 34
 using business processes 33

Seniority Pay - Comp Rate Code Table
 page 6
 seniority pay component, definition xxi
 Seniority Pay page - Comp Rate Code
 Table 10
 seniority rate code, definition xxi
 seniority rate codes
 associating with compensation
 increases 10
 creating 10
 updating in worker compensation
 packages 33
 suggestions, submitting xiv

T

terms 63
 typographical conventions xii

U

Update Seniority Eligibility – Seniority Pay
 page 36
 Update Seniority Eligibility - Seniority Pay
 page 34
 Update Seniority Pay - Seniority Pay
 page 34

V

Values page 17, 20
 View Base Compensation page 47, 54
 View Group Budgets page 47, 55
 visual cues xiii

W

wage progression
 Define Wage Progression Rule page 25
 prerequisites 23
 Salary Plan Table page 25
 Salary Step Components page 25
 setting up and using 24
 understanding 23
 wage progression rules
 applying to salary plans 30
 defining 26
 defining a salary plan 25
 warnings xiii
 worker compensation packages, *See*
 compensation packages
 worker eligibility 36

