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PeopleSoft Enterprise eCompensation 9.1 PeopleBook

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PeopleSoft Enterprise eCompensation Preface

This preface discusses:

- PeopleSoft Products.
- PeopleSoft Enterprise application fundamentals.

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 eCompensation.

PeopleSoft Enterprise Application Fundamentals

The *PeopleSoft Enterprise eCompensation 9.1 PeopleBook* provides you with implementation and processing information for your PeopleSoft Enterprise eCompensation system. Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook.* Each PeopleSoft Enterprise product line has its own version of this documentation.

PeopleSoft Enterprise HRMS 9.1 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 PeopleSoft Enterprise HRMS products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

PeopleBooks and the PeopleSoft Online Library

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

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

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

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Chapter 1

Getting Started with eCompensation

This chapter provides an overview of eCompensation and discusses eCompensation implementation.

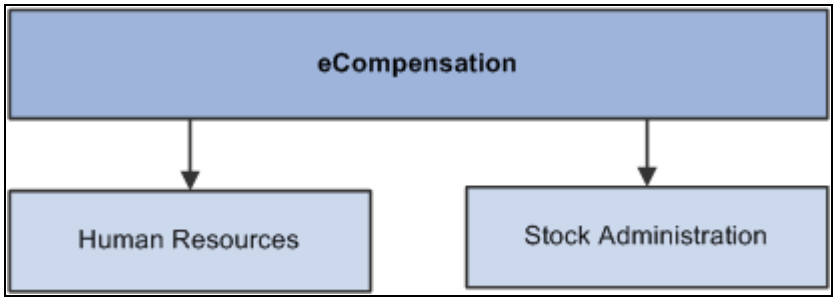
eCompensation Overview

eCompensation comprises self-service Web transactions that interface with the PeopleSoft Enterprise Human Resources system. Workers can:

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

eCompensation Integrations

eCompensation integrates with the following PeopleSoft Enterprise applications:



eCompensation integration flow with other PeopleSoft Enterprise Human Resources and Stock Administration applications

eCompensation Implementation

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

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See Also

PeopleSoft Enterprise HRMS 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

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Chapter 2

Viewing Compensation History

This chapter discusses how to view worker compensation history.

Viewing Compensation History

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

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

Understanding the Pages Used to View Compensation History

Workers use this transaction to view their compensation histories. The main page displays salary change history and cash and noncash variable awards.

Workers can:

- View details of stock options granted through a variable compensation plan if PeopleSoft Enterprise Stock Administration is not installed.
- Follow a link to view stock option details if Stock Administration is installed.
- Follow links to review information about stock options that were not granted through variable compensation plans.

Pages Used to View Compensation History

Page Name	*Definition Name*	*Navigation*	*Usage*
Compensation History	HR_SS_EE_COMP_HIST	Self Service, Payroll and Compensation, Compensation History	View compensation history.
Salary Change Details	HR_SS_EE_SALCG_SEC	Click a date in the Date of Change column in the Salary History section on the Compensation History page.	View details of a salary change.

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Chapter 3

(FRA) Profit-Sharing Self-Service Transactions

This chapter provides an overview of the profit-sharing transactions for France, lists prerequisites, and discusses how to:

- View agreement information.
- Personalize agreement options.
- View a profit-sharing amount.
- Submit a fund release request.

Understanding the Profit-Sharing Self-Service Transactions

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

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

- Agreement Personalization (HR_SS_WP_AGREEMENT)

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

- Profit-Sharing Entitlements (HR_SS_WP_PROFIT_SH)

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

Note. Worker options are also provided with the Manage Profit Sharing business process in PeopleSoft Enterprise Human Resources.

See Also

PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage French Profit Sharing, "Using Profit Sharing Employee Options," Viewing Personal Entitlements and Requesting Fund Release

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Prerequisites

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

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

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

Pages Used by the Profit-Sharing Self-Service Transactions

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

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

Viewing Agreement Information

Access the Agreement Information page (Self Service, Payroll and Compensation, Agreement Personalization, Agreement Information).

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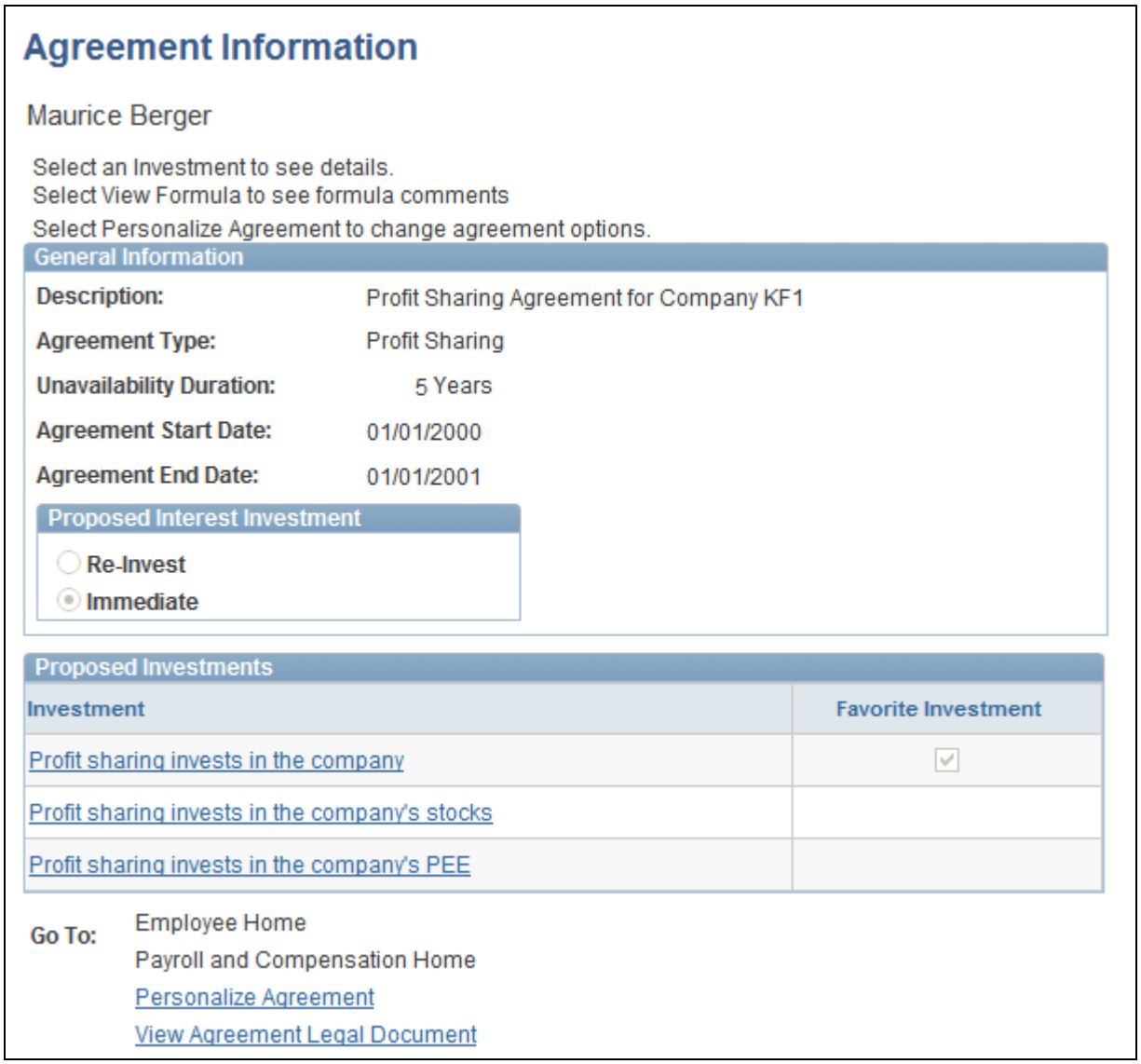

Agreement Information page

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

Proposed Investments

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

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

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

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Computed Global Fund

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

From Date and **Thru Date** (through date)	The start and end dates of the reference period.
Global Fund Amount	Displays the total global fund. This amount is calculated by the Compute Global Fund process, using the formulas defined on the Define Agreement - Computation page.
View Formula	Click to view the formula that was used to calculate the global fund. The system displays the formula comments entered on the Formula Comments page.
Personalize Agreement	Click to access the Personalize Agreement Options page, where workers can select the following for each reference period of the agreement: • The investment method. • How interest is paid (for profit-sharing agreements with *Company Investment* as the investment method). Workers can't change this information after the personalization date defined for the reference period. If a worker receives a payment or a transfer is completed before the personalization deadline, the system doesn't allow them to update the agreement settings after this payment or transfer date. If a personalization date is not defined, a worker can't personalize an agreement if the reference period status is approved.
View Agreement Legal Document	Click to display the agreement document.

Personalizing Agreement Options

Access the Personalize Agreement Options page (click the Personalize Agreement link on the Agreement Information page).

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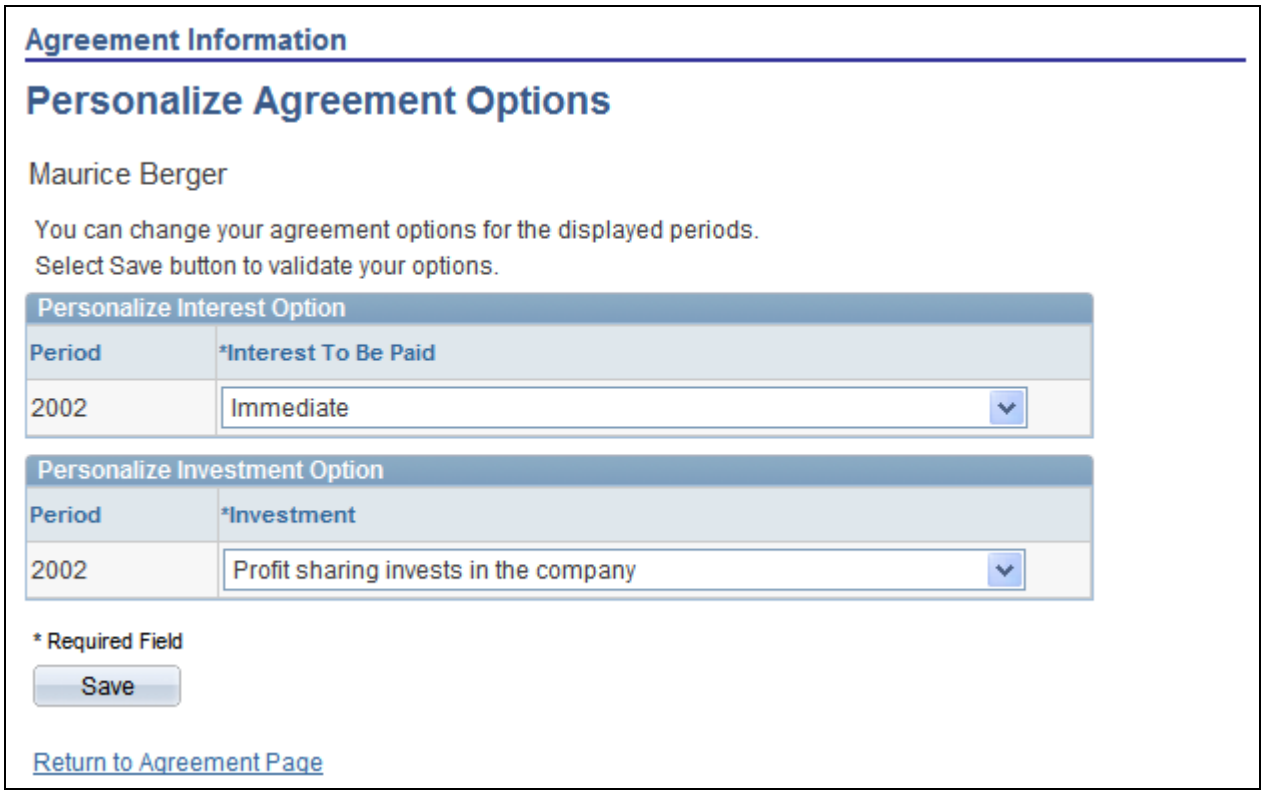

Personalize Agreement Options page

Personalize Interest Option

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

Interest To Be Paid The system displays the default method for handling interest payments, as defined in the agreement. Workers can override the default option for each reference period. Options are:

Immediate: To receive interest payments once a year.

Re-Invest: To reinvest interest payments in the worker's profit-sharing fund. The interest is added to the worker's individual fund, which generates further interest the next year.

Personalize Investment Option

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

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Investment If multiple investment methods are defined for an agreement, workers can select the investment method for their fund. Workers can select only from the methods defined for the agreement on the Investment page.

Workers who are leaving the organization select *Transfer to new comp/fin orga.* to identify the organization to which the funds are transferred.

Viewing a Profit-Sharing Amount

Access the Profit-Sharing page (Self Service, Payroll and Compensation, Profit-Sharing Entitlements, Profit-Sharing).

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage French Profit Sharing*, "Using Profit Sharing Employee Options," Viewing Personal Entitlements and Requesting Fund Release.

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

Submitting a Fund Release Request

Access the Submit Fund Release Request page (click the Release Request button on the Profit Sharing page).

Submitted Requests

Displays details of requests previously submitted by the worker.

New Request

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

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

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

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

  To do this, they select *Available* in the Event field.

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

See *PeopleSoft Enterprise Human Resources 9.1 PeopleBook: Manage French Profit Sharing*, "Using Profit Sharing Employee Options," Viewing Personal Entitlements and Requesting Fund Release.

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