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# PeopleSoft HCM 9.2: Human Resources Administer Compensation

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January 2021

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# Preface

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## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

### Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| <b><i>Typographical Convention</i></b> | <b><i>Description</i></b>                                                                                                                                                                                                          |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.              |
| . . . (ellipses)                       | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.                                                                                                                               |
| { } (curly braces)                     | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).                                                                                                                                   |
| [ ] (square brackets)                  | Indicate optional items in PeopleCode syntax.                                                                                                                                                                                      |
| & (ampersand)                          | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br><br>Ampersands also precede all PeopleCode variables.                                         |
| ⇒                                      | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation

does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY\_CD\_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY\_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- 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 the PeopleSoft Online Help:

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

## Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

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## Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

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## Related Links for PeopleSoft HCM

[Oracle Help Center](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[PeopleSoft Spotlight Series](#)

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# Getting Started with Administer Compensation

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## 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.

- Using wage progression.

Define salary plans with wage progression rules.

- 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.

See "Understanding Market Pay" (PeopleSoft HCM 9.2: Application Fundamentals)

- Implementing Total Rewards statements.

Set up and generate total rewards statements to show the total value of employee's compensation (both salary and benefits) in one central place.

We discuss these business processes in the business process topics in this product documentation.

---

## Administer Compensation Integrations

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

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

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

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

We discuss integration considerations in this product documentation.

---

## Administer Compensation Implementation

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

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

| <b>Component</b> | <b>Component Interface</b> | <b>References</b>                                                                                     |
|------------------|----------------------------|-------------------------------------------------------------------------------------------------------|
| COMP_RATECD_TBL  | CI_COMP_RATECD_TBL         | See <a href="#">Setting Up Rate Codes</a> .                                                           |
| JOB_CODE_TBL     | CI_JOB_CODE_TBL            | See "Defining Job Subfunction and Job Function Codes" (PeopleSoft HCM 9.2: Application Fundamentals). |

| <b>Component</b> | <b>Component Interface</b> | <b>References</b>                                                                                                              |
|------------------|----------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| SALARY_GRADE_TBL | SALARY_GRADE_TBL           | See "Setting Up Salary Plans, Grades, and Steps" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting). |

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID [2342162.1](#)) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

See *PeopleTools: Component Interfaces*, *PeopleTools: Setup Manager*

## 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.

## Related Links

Application Fundamentals



# Setting Up Administer Compensation

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## Understanding Administer Compensation

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

To administer compensation:

1. Define rate code classes on the Rate Code Classes page.
2. (Required) 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.

### Related Links

"Defining Job Subfunction and Job Function Codes" (PeopleSoft HCM 9.2: Application Fundamentals)

"Setting Up Base Compensation Budgeting and Planning" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)

"Understanding Positions" (PeopleSoft HCM 9.2: Human Resources Manage Positions)

---

## Common Elements Used to Administer Compensation

|                              |                                                                                                                                                                                                                                                                                                                                     |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Frequency</b>             | Enables you to select a frequency (hourly, daily, monthly, annually, and so on) in which to express the compensation rate.                                                                                                                                                                                                          |
| <b>Base Pay</b>              | 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.                                                   |
| <b>Compensation Package</b>  | All of the base and non-base pay components on a job row.                                                                                                                                                                                                                                                                           |
| <b>Job Code</b>              | An ID for a job as defined on the Job Code table.                                                                                                                                                                                                                                                                                   |
| <b>Job Code Component</b>    | 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.                                                                                                                             |
| <b>Job Compensation Rate</b> | The compensation rate of the corresponding job row.                                                                                                                                                                                                                                                                                 |
| <b>Non-Base Pay</b>          | 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.                                                                                                            |
| <b>Pay Component</b>         | A row in a compensation record that builds the compensation packages in that record.                                                                                                                                                                                                                                                |
| <b>Rate Code</b>             | 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.                                                                                    |
| <b>Rate Code Group</b>       | 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. |
| <b>Rate Code Type</b>        | 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.                                                                                                  |
| <b>Rate Matrix</b>           | A matrix that is associated with a rate code, which applies rules and formulas to determine the amount or rate for a specific employee.                                                                                                                                                                                             |

|                                   |                                                                                                                                                                                                                                                                         |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Rules-Driven Pay Component</b> | 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.                                                                                                                |
| <b>Salary Step Component</b>      | A pay component that is assigned to a salary step by entering the corresponding rate code on the Salary Step Components page.                                                                                                                                           |
| <b>Seniority Pay</b>              | A premium that is paid for the length of time that an employee has worked for an organization.                                                                                                                                                                          |
| <b>Seniority Pay Component</b>    | 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.                                               |
| <b>Seniority Rate Code</b>        | 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. |

---

## 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 topic provides an overview of creating seniority rate codes, lists the pages used to set up rate codes, and discusses how to set up 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

| <b>Page Name</b>                                                                 | <b>Definition Name</b> | <b>Usage</b>                                                                                                                          |
|----------------------------------------------------------------------------------|------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Rate Code Class Table Page</a>                                       | RATECD_CLASS_TBL       | Create rate code classes.                                                                                                             |
| <a href="#">Comp Rate Code Table Page</a><br>(compensation rate code table page) | COMP_RATECD_TBL        | Define rate codes.                                                                                                                    |
| <a href="#">Comp Rate Code Table - Seniority Pay Page</a>                        | SENIORITY_PAY          | Associate a seniority rate code with either levels of compensation increases or one or more groups that you define using Group Build. |
| <a href="#">Comp Rate Code Table - Combination Rules Page</a>                    | COMP_RATECD_RULES      | View defaulting rules associated with a compensation rate code.                                                                       |

## Rate Code Class Table Page

Use the Rate Code Class Table page (RATECD\_CLASS\_TBL) to create rate code classes.

### Navigation

Set Up HCM > Foundation Tables > Compensation Rules > Rate Code Class Table > Rate Code Class Table

### Image: Rate Code Class Table page

This example illustrates the fields and controls on the Rate Code Class Table page.

The screenshot shows the 'Rate Code Class Table' page. At the top, it displays 'Rate Code Class SENPAY'. Below this, there is a section titled 'Rate Code Class Information'. This section includes a search bar with 'Find | View All' and pagination controls showing 'First 1 of 1 Last'. The main form contains the following fields:

- \*Effective Date:** A date field set to '01/01/1900' with a calendar icon.
- \*Status:** A dropdown menu currently set to 'Active'.
- \*Description:** A text field containing 'Seniority Rate Codes'.
- Short Description:** A text field containing 'Sen Rate Codes'.

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.

## Comp Rate Code Table Page

Use the Comp Rate Code Table (compensation rate code table) page (COMP\_RATECD\_TBL) to define rate codes.

### Navigation

Set Up HCM > Foundation Tables > Compensation Rules > Comp Rate Code Table > Comp Rate Code Table

## Image: Comp Rate Code Table page

This example illustrates the fields and controls on the Comp Rate Code Table page.

The screenshot shows the 'Comp Rate Code Table' page with the 'Seniority Pay' tab selected. The page displays the following fields and controls:

- Comp Rate Code:** HXMC51
- Compensation Rate Code Information:**
  - \*Effective Date:** 01/01/1980
  - \*Status:** Active
  - \*Description:** Seniority with Age
  - Short Description:** Age
  - Base Pay:** ☒
  - Use Highest Rate:** ☐
  - Apply FTE:** ☐
  - Default Without Override:** ☒
  - \*Rate Code Type:** Flat Amount
  - Rate Code Class:** SENPAY
  - \*Calculated By:** None
  - Compensation Rate:** 0.000000
  - Currency:**
  - Frequency:**
  - Earnings Code:**
  - Rate Matrix Name:**
  - Comp Percent:** 0.000
- Salary Packaging:**
  - ☐ Maintained via Package Only

### Use Highest Rate

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

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

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

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

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

### Default Without Override

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

---

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

---

### Rate Code Type

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

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

---

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

---

See "Setting Up Implementation Defaults" (PeopleSoft HCM 9.2: Application Fundamentals).

### Rate Code Class

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

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

---

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

---

### Calculated By

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

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

This value uses the current functionality.

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

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

---

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

---

## Rate Matrix

Select the specific rate matrix to be used.

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

---

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

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

---

See "Understanding Configurable Matrices" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting).

## 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.

## 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.

## Currency

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

## Frequency

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

**Earnings Code**

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

**(AUS) Australia**

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

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

**Maintained via Package Only**

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

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

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

**Using Rate Codes – Example**

If a worker is assigned a rate code that is matrix-based, there will only be an initial evaluation of the rate matrix to determine the compensation rate for that rate code. This is consistent with current rules for rate code management. Over time, worker information may change that could warrant the assignment of a different rate from the matrix. However, the system will not do this automatically. The only way to get rates reevaluated automatically is by running one of the existing batch processes (CMPnnn). In general most of 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.

**Related Links**

"Designing Your Salary Packaging Program" (PeopleSoft HCM 9.2: Human Resources Administer Salary Packaging)

**Creating Seniority Rate Codes**

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

To create a seniority rate code:

1. Associate a rate code with the predefined seniority rate code class SENPAY.
2. Associate the rate code with levels of seniority compensation increase.

- (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.

---

## Comp Rate Code Table - Seniority Pay Page

Use the Comp Rate Code Table - Seniority Pay page (SENIORITY\_PAY) to associate a seniority rate code with either levels of compensation increases or one or more groups that you define using Group Build.

### Navigation

Set Up HCM > Foundation Tables > Compensation Rules > Comp Rate Code Table >Comp Rate Code Table - Seniority Pay

### Image: Comp Rate Code Table - Seniority Pay page

This example illustrates the fields and controls on the 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.

## Comp Rate Code Table - Combination Rules Page

Use the Comp Rate Code Table - Combination Rules page (COMP\_RATECD\_RULES) to view defaulting rules associated with a compensation rate code.

### Navigation

Set Up HCM > Foundation Tables > Compensation Rules > Comp Rate Code Table > Combination Rules

### Image: Comp Rate Code Table - Combination Rules page: Rules tab

This example illustrates the fields and controls on the 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 Comp Rate Code Table - Combination Rules page: Values tab.

### Image: Comp Rate Code Table - Combination Rules page: Values tab

This example illustrates the fields and controls on the Comp Rate Code Table - Combination Rules page: Values tab.

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

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

## Defining Groups of Rate Codes

To set up rate code groups, use the Rate Code Groups (RATE\_CODE\_GROUPS) component.

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

### Page Used to Create Groups of Rate Codes

| Page Name             | Definition Name | Usage                        |
|-----------------------|-----------------|------------------------------|
| Rate Code Groups Page | COMPRT_GRP_PNL  | 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 HCM 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.

# Defining Compensation Rates and Rules-Driven Component Defaulting

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## Understanding Rules-Driven Component Defaulting

This topic discusses rules-driven component defaulting.

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

To set up component defaulting rules:

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

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

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

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

---

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

---

You can also use the Refresh Employee Compensation process to set the default values for the compensation packages of a defined worker group. When you trigger the component defaulting process,

the system updates the compensation record of any worker who meets the criteria established in the defaulting rule.

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

---

## Defining Compensation Rates for Workers

Use the CI\_JOB\_CODE\_TBL and SALARY\_GRADE\_TBL component interfaces to load the data into the tables for these component interfaces.

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

### Overview of Steps for Defining Rates of Pay

| <b><i>Associate rate codes with:</i></b>           | <b><i>On the:</i></b>                                                                                                                                      |
|----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Salary steps                                       | "Salary Step Components Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)                                                 |
| Job codes                                          | "Default Compensation Page" (PeopleSoft HCM 9.2: Application Fundamentals) and "Non-Base Compensation Page" (PeopleSoft HCM 9.2: Application Fundamentals) |
| Positions (using the job codes you assign to them) | "Position Data - Description Page" (PeopleSoft HCM 9.2: Human Resources Manage Positions)                                                                  |
| Employee records                                   | "Compensation Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce)                                                                             |

---

## Defining Rules-Driven Component Defaulting

This topic lists the pages used to define rules-driven component defaulting and discusses how to define rules-driven component defaulting.

### Pages Used to Define Rules-Driven Component Defaulting

| <b><i>Page Name</i></b>                  | <b><i>Definition Name</i></b> | <b><i>Usage</i></b>                                                          |
|------------------------------------------|-------------------------------|------------------------------------------------------------------------------|
| <u>Rate Code Defaulting Options Page</u> | CMP_DFLT_OPTIONS              | Specify which Job record fields are available to component defaulting rules. |

| <b>Page Name</b>                                                                | <b>Definition Name</b> | <b>Usage</b>                                                                                      |
|---------------------------------------------------------------------------------|------------------------|---------------------------------------------------------------------------------------------------|
| <a href="#">Rate Code Defaulting Rules - Definition Page</a>                    | CMP_RULE_DEFN          | Define component defaulting rule header information.                                              |
| <a href="#">Rate Code Defaulting Rules - Criteria Page</a>                      | CMP_RULE_CRITERIA      | Create and modify criteria for component defaulting rules.                                        |
| <a href="#">Rate Code Defaulting Rules - Values Page</a>                        | CMP_RULE_VALUES        | Specify the values that the fields and operators you selected on the Criteria page should act on. |
| <a href="#">Rate Code Defaulting Rules - Rate Codes Page</a>                    | CMP_RULE_RATECD        | Assign rate codes to the component defaulting rules.                                              |
| "Rate Code Details Page" (PeopleSoft HCM 9.2: Human Resources Manage Positions) | WCS_RTCD_DETAILS       | View additional information about the compensation rate code.                                     |

## Rate Code Defaulting Options Page

Use the Rate Code Defaulting Options page (CMP\_DFLT\_OPTIONS) to specify which Job record fields are available to component defaulting rules.

### Navigation

Set Up HCM > Foundation Tables > Compensation Rules > Rate Code Rate Code Defaulting Options > Rate Code Defaulting Options

### Image: Rate Code Defaulting Options page

This example illustrates the fields and controls on the Rate Code Defaulting Options page.

**Rate Code Defaulting Options**

Record: JOB      EE Job History

**Defaulting Rule Options**      Find | View All      First 1 of 16 Last

\*Field Name: BUSINESS\_UNIT

\*Field Label: Business Unit

Edit Table: BUSUNIT\_HR\_VW      HR Business Unit Lang Table

**Prerequisite Fields**      Personalize | Find | 1 of 1 Last

|   | *Required for Prompt | *Field Label | Equivalent Record Field |
|---|----------------------|--------------|-------------------------|
| 1 |                      |              |                         |

## 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.

## **Rate Code Defaulting Rules - Definition Page**

Use the Rate Code Defaulting Rules - Definition page (CMP\_RULE\_DEFN) to define component defaulting rule header information.

#### **Navigation**

Set Up HCM > Foundation Tables > Compensation Rules > Rate Code Defaulting Rules > Rate Code Defaulting Rules - Definition

### Image: Rate Code Defaulting Rules - Definition page

This example illustrates the fields and controls on the Rate Code Defaulting Rules - Definition page.

Defaulting Rule K0G002

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

\*Effective Date 01/01/1980

\*Status Active

\*Description Marketing Department Bonus

Short Description Marketing Dept Bonus

Rate Code Source Combination Rule

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.

### Rate Code Defaulting Rules - Criteria Page

Use Rate Code Defaulting Rules - Criteria page (CMP\_RULE\_CRITERIA) to create and modify criteria for component defaulting rules.

#### Navigation

Set Up HCM > Foundation Tables > Compensation Rules > Rate Code Defaulting Rules > Rate Code Defaulting Rules - Criteria

## Image: Rate Code Defaulting Rules - Criteria page

This example illustrates the fields and controls on the Rate Code Defaulting Rules - Criteria page.

The screenshot displays the 'Criteria' tab of the 'Rate Code Defaulting Rules' page. At the top, there are four tabs: 'Definition', 'Criteria' (selected), 'Values', and 'Rate Codes'. Below the tabs, the 'Defaulting Rule' is identified as 'K0G002'. The 'Effective Date' is '01/01/1980' and the 'Status' is 'Active'. The 'Rate Code Source' is 'Combination Rule'. A section titled 'Defaulting Rule Criteria' contains a search bar and 'Find | View All' links. It lists three criteria: '\*Record' with the value 'JOB' (linked to 'EE Job History'), '\*Field Name' with the value 'DEPTID' (linked to 'Department'), and '\*SQL Operator' with the value 'Equals' (linked to 'Departments'). The 'Edit Table' is 'DEPT\_TBL'.

**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.

## Rate Code Defaulting Rules - Values Page

Use Rate Code Defaulting Rules - Values page (CMP\_RULE\_VALUES) to specify the values that the fields and operators you selected on the Rate Code Defaulting Rules - Criteria page should act on.

### Navigation

Set Up HCM > Foundation Tables > Compensation Rules > Rate Code Defaulting Rules > Rate Code Defaulting Rules - Values

### Image: Rate Code Defaulting Rules - Values page

This example illustrates the fields and controls on the Rate Code Defaulting Rules - Values page.

Defaulting Rule K0G002

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

Effective Date 01/01/1980

Rate Code Source Combination Rule Status Active

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

Record JOB Field Name DEPTID Equals

Values Personalize | Find | First 1 of 1 Last

| Sequence | SetID | Value |
|----------|-------|-------|
| 1        | SHARE | 25000 |

#### SetID and Value

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

## Rate Code Defaulting Rules - Rate Codes Page

Use the Rate Code Defaulting Rules - Rate Codes page (CMP\_RULE\_RATECD) to assign rate codes to the component defaulting rules.

#### Navigation

Set Up HCM > Foundation Tables > Compensation Rules > Rate Code Defaulting Rules > Rate Code Defaulting Rules - Rate Codes

### Image: Rate Code Defaulting Rules - Rate Codes page

This example illustrates the fields and controls on the Rate Code Defaulting Rules - Rate Codes page.

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 Personalize | Find | First 1 of 1 Last

| Rate Code | Seq | Details | Comp Rate | Currency | Freq | Percent | Rate Code Group | Points | Apply FTE                           |
|-----------|-----|---------|-----------|----------|------|---------|-----------------|--------|-------------------------------------|
| K0GNU     | 1   | Details | 1,800.00  | USD      | A    |         |                 |        | <input checked="" type="checkbox"/> |

|                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Rate Code</b>                     | Select the rate code to be used as the default for this defaulting rule.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Details</b>                       | 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.                                                                                                                                                                                                                                                                                                                                                     |
| <b>Comp Rate</b> (compensation rate) | <p>Enter the compensation rate for this defaulting rate code rule.</p> <p>If the rate code type is <i>Flat Amount</i>, <i>Hourly Rate</i>, or <i>Hourly Rate + Flat Amount</i>, enter a compensation rate for the rate code.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> |

## Chapter 4

# Using Wage Progression with Administer Compensation

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## 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 HR as your core system of record for worker information.

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

- Select Multi-Step Grade option on the Installation Table - HCM Options page (Set Up HCM > Install > Installation Table > HCM Options).
- Determine if your wage progression rules require time worked data.

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

### Related Links

"Establishing Special Accumulator Codes" (PeopleSoft HCM 9.2: Payroll for North America)  
"Understanding Earnings Tables" (PeopleSoft HCM 9.2: Payroll for North America)

## 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" (PeopleSoft HCM 9.2: Manage Labor Administration) of the Labor Agreement component (Set Up HCM > Product Related > Workforce Administration > Labor Administration > Labor Agreement).

This topic discusses how to set up and use wage progression with Administer compensation.

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

| <i><b>Page Name</b></i>                  | <i><b>Definition Name</b></i> | <i><b>Usage</b></i>                                          |
|------------------------------------------|-------------------------------|--------------------------------------------------------------|
| <u>Salary Plan Page</u>                  | SALARY_PLAN_TABLE             | Define salary plan basics.                                   |
| <u>Define Wage Progression Rule Page</u> | SALARY_PLAN_TABLE2            | Define wage progression rules associated with a salary plan. |
| <u>Salary Step Components Page</u>       | SALARY_GRADE_T3GBL            | Generate salary steps using wage progression rules.          |

### Salary Plan Page

Use the Salary Plan page (SALARY\_PLAN\_TABLE) to define salary plan basics.

#### Navigation

- Set Up HCM > Product Related > Compensation > Base Compensation > Salary Plan
- Compensation > Base Compensation > Maintain Plans > Define Salary Plan

**Image: Salary Plan page (1 of 2)**

This example illustrates the fields and controls on the Salary Plan page (1 of 2).

**Salary Plan**

Set ID: SHARE      Salary Administration Plan: KUH1      Business Units that use this Set ID

Salary Plan ?      Find      First 1 of 1 Last      + -

\*Effective Date: 01/01/1980      \*Status: Active      Go To Row

\*Description: Professional Workers

Short Description: Profession      ☒ Wage Progression Plan      Define Wage Progression Rule

\*Standard Hours: 40.00      Work Period: W Weekly

\*Currency Code: USD      US Dollar

Default Salary Matrix Code:      Default Rating Model:      Company: GBI      Global Business Institute 9999

| Frequency Defaults ? |                                        | Auto Calculated Premium ?                        |                      |
|----------------------|----------------------------------------|--------------------------------------------------|----------------------|
| Hourly               | <input type="text" value="H"/> Hourly  | <input type="checkbox"/> Auto Calculated Premium |                      |
| Daily                | <input type="text" value="D"/> Daily   | Absorbing Premium                                | <input type="text"/> |
| Monthly              | <input type="text" value="M"/> Monthly | Non-Absorbing Premium                            | <input type="text"/> |

**Image: Salary Plan page (2 of 2)**

This example illustrates the fields and controls on the Salary Plan page (2 of 2).

**Attached File**

URL Identifier:      Add

Long Description:      Added By:      Date Added:     

☒ Germany

Tariff:      Tariff Area:     

☒ Japan

Salary Plan Explanation:     

**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 "Define Salary Plan Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting) topic.

## Define Wage Progression Rule Page

Use the Define Wage Progression Rule page (SALARY\_PLAN\_TABLE2) to define wage progression rules associated with a salary plan.

### Navigation

- Set Up HCM > Product Related > Compensation > Base Compensation > Salary Plan

Select the Wage Progression Plan check box. The system displays the Define Wage Progression link. Click this link to display the page.

- Compensation > Base Compensation > Maintain Plans > Define Salary Plan

Select the Wage Progression Plan check box. The system displays the Define Wage Progression link. Click this link to display the page.

### Image: Define Wage Progression Rules page

This example illustrates the fields and controls on the Define Wage Progression Rules page.

Set ID 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 ?
Personalize | Find | View All | First 1-7 of 7 Last

Return To Salary Plan Definition

## 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.

|                                                |                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Comp Rate Code</b> (compensation rate code) | This rate code is inserted on the grade step during step generation and will store the calculated rate.                                                                                                                                                                                                                                                                                                           |
| <b>Hours Accumulator</b>                       | Only available if you select an Increment Type of <i>Hours Worked</i> . Select the Payroll for North America Payroll special accumulator to use in order to capture the hours worked for this wage progression rule.                                                                                                                                                                                              |
| <b>Leave Accumulator</b>                       | (Optional) This field is only available if you select an Increment Type of <i>Elapsed Months</i> or <i>Elapsed Weeks</i> . This Payroll for North America special accumulator can capture reported leave hours. This is only required if your progression rule has a secondary qualifier to make sure a worker has not exceeded the specified number of leave hours during the required elapsed time in the step. |

## Advancement Processing Rules

|                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Exceed maximum for Grade</b>                                    | (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.                                                                                                                                                                                                                                                             |
| <b>Round to Max of Grade Within</b><br>(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.                                                                                                                                                                                                                            |
| <b>Tolerance Type</b>                                              | <p>This field indicates the closeness unit that you want the rounding rule to evaluate. Select one of these values:</p> <ul style="list-style-type: none"> <li>• <i>Percent</i>: Enter the percent for the tolerance.<br/><br/>If you select this option, the Tolerance Percent field becomes available.</li> <li>• <i>Flat</i>: Enter the amount of the tolerance.<br/><br/>If you select this option, the Tolerance Amount field becomes available.</li> </ul> |
| <b>Tolerance Percent</b>                                           | Enter the percent for rounding purposes. This field is available if you select <i>Percent</i> as a Tolerance Type.                                                                                                                                                                                                                                                                                                                                               |
| <b>Tolerance Amount</b>                                            | Enter the amount for rounding purposes. This field is available if you select <i>Flat</i> as a Tolerance Type.                                                                                                                                                                                                                                                                                                                                                   |
| <b>Advancement Approval Required</b>                               | (Optional) Select this check box if approval is necessary before step increases are awarded. When selected you must review and manually approve workers in order for the step advancement batch process to pick them up and perform the step and compensation updates.                                                                                                                                                                                           |

To manually approve the advancement, use the Approve Employees to Advance page (Workforce Administration > Labor Administration > Wage Progression).

If you select this check box, the Days Within: field becomes available.

### **Days Within**

To present workers for approval prior to their estimated advancement date, enter the number of days prior to that date.

The workers will be set to Almost Qualified status during the Update Wage Progression Qualification sub-process.

You can then approve them early, if appropriate. This can facilitate timely processing of the step and rate increase and its recognition by payroll.

### **Job Action**

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

### **Reason**

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

---

**Note:** Once workers have reached or exceeded the maximum rate for the grade, they are considered at *parity* for their job wage rate. When this occurs, the worker's step will be 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 free form field.

### **Time Required in Step**

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

### **Units**

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

## **Wage Progression Steps - Increase tab**

### **Increase Amount**

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

incremental amount, the value will be an amount. The currency code of the Salary Plan applies.

## Wage Progression Steps - Time Limits tab

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

### Time Limit

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

### Time Limit Units

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

### Maximum Leave Hours

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

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

## Salary Step Components Page

Use the Salary Step Components page (SALARY\_GRADE\_T3GBL) to generate salary steps using wage progression rules.

### Navigation

Compensation > Base Compensation > Maintain Plans > Define Salary Grades > Salary Step Components

### Image: Salary Step Components page

This example illustrates the fields and controls on the Salary Step Components page.

The screenshot displays the 'Salary Step Components' page for 'Salary Grade 1'. Key fields include: Set ID (SHARE), Salary Administration Plan (KUH1), Professional Workers, Standard Hours (40.00), Salary Basis (A), and Annl Basis. The 'Effective Date' is 01/01/1980, and the 'Status' is Active. The 'Increment Type' is set to 'Weeks Based Ir'. The 'Wage Progression Rule' is selected. Below these, the 'Salary Step' section shows 'Step 1' with a description 'Amt Inc Elap Wks Appr Step 1'. The 'Salary Components' table lists one component: NAHRLY, Seq 0, Details, Comp Rate 21.000000, Currency USD, Frequency H. The 'Totals' section shows: Hourly Rate 21.000000, Daily Rate 168.000, Monthly Rate 3,640.00, and Annual Rate 43,680.00. The page footer indicates the user is in Australia.

**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

---

## 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.

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## 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 topic provides an overview of the Update Seniority Pay process, lists prerequisites, and discusses how to administer seniority pay.

## Pages Used to Administer Seniority Pay

| <b>Page Name</b>                                                                                        | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                                                                                                                                                             |
|---------------------------------------------------------------------------------------------------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Update Seniority Pay Page</a>                                                               | RUNCTL_SENPAY2         | Add and update seniority pay components in workers' compensation packages.                                                                                                                                                                                                                                                                               |
| <a href="#">Update Seniority Eligibility Page</a><br><a href="#">Multiple Seniority Components Page</a> | RUNCTL_SENPAY          | <ul style="list-style-type: none"> <li>• Run the Update Seniority Eligibility Process (HR_CMP014) to ensure that workers are still eligible for seniority pay components.</li> <li>• Generate the Multiple Seniority Components report (PER044).</li> </ul> <p>Use this report to review the worker records that have multiple seniority rate codes.</p> |

## 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.

### Related Links

[Comp Rate Code Table Page](#)

## Update Seniority Pay Page

Use the Update Seniority Pay page (RUNCTL\_SENPAY2) to add and update seniority pay components in workers' compensation packages.

### Navigation

Workforce Administration > Collective Processes > Seniority Processing > Update Seniority Pay > Update Seniority Pay

**Image: Update Seniority Pay page**

This example illustrates the fields and controls on the Update Seniority Pay page.

**Update Future Rows**

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

**Don't Absorb Changes**

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

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

**Process By**

Select Rate Code or Group ID as the way to run the Update Seniority Pay process (HR\_CMP013).

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

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

**Rate Code**

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

**Group ID**

This field is available when you select Group ID in the Process By group box. Select one or more group IDs. Insert rows if you

need to run the process using multiple group IDs. The system only displays the groups for which you have security access.

## Running the Update Seniority Pay Process

To run the Update Seniority Pay process:

1. Run the Application Engine process HR\_CMP013.

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

2. Run the SQR report CMP013 to review the information loaded by the Application Engine process.
3. Run the Application Engine process HR\_CMP013\_CI to load the information to the worker Job Data pages.

See Also *PeopleTools: Process Scheduler*

### Related Links

"Define Salary Plan Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)

"Setting Up Group Security" (PeopleSoft HCM 9.2: Application Fundamentals)

## Update Seniority Eligibility Page

Use the Update Seniority Eligibility page (RUNCTL\_SENPAY) to run the Update Seniority Eligibility Process (HR\_CMP014) to ensure that workers are still eligible for seniority pay components.

Use the Multiple Seniority Components page (RUNCTL\_SENPAY) to generate the Multiple Seniority Components report (PER044).

### Navigation

- Workforce Administration > Collective Processes > Seniority Processing > Update Seniority Eligibility > Update Seniority Eligibility
- Workforce Administration > Collective Processes > Seniority Processing > Multiple Seniority Components

## Image: Update Seniority Eligibility page

This example illustrates the fields and controls on the Update Seniority Eligibility page.

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

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

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

Additionally, the page designs of the Update Seniority Eligibility page and Multiple Seniority Components page are almost the same, except that the Update Future Rows and Don't Absorb Changes options are not available in the Multiple Seniority Components 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.

## Related Links

[Update Seniority Pay Page](#)



# Refreshing Worker Compensation Information

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## 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.

### Related Links

PeopleSoft Human Resources 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 Profile Page" (PeopleSoft HCM 9.2: Application Fundamentals).
- Associate the salary plan with a job code on the "Default Compensation Page" (PeopleSoft HCM 9.2: Application Fundamentals).

If there is no salary plan associated with the location entered on the "Work Location Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce), the system will enter the salary plan (and step and grade, if applicable) associated with the job code you enter on the "Job Information Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

- Assign a salary plan directly to a worker on the "Job Data - Salary Plan Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

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

- Associate a salary plan with a labor agreement on the "Categorization Defaults Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting).
- Associate a salary plan with a labor agreement directly to a worker on the "Job Data - Salary Plan Page" (PeopleSoft HCM 9.2: Human Resources Administer Workforce).

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 the Multi-step Grade option on the "HCM Options Page" (PeopleSoft HCM 9.2: Application Fundamentals).

---

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

## Salary Administration Plan Defaulting at Hire

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

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

---

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

---

## Salary Administration Plan Defaulting After Hire

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

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

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

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

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

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

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

---

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

---

## Refreshing Worker Compensation Packages

To refresh worker compensation packages, use the Refresh Compensation (RUN\_CMP015) component.

Use the Refresh Employee Compensation Application Engine process (HR\_CMP015) to update worker compensation packages when you make a change to any element of a worker's Job record that affects compensation. This process recalculates compensation based on the current values in the system and automatically populates the correct compensation amount by inserting a new Job row (unless there is no change to a worker's compensation). The process replaces manual changes with the new default values.

---

**Note:** If the user ID of the person running the Refresh Compensation process does not have full access to the CI\_JOB\_DATA component, the system displays an error message.

---

### Page Used to Refresh Worker Compensation Packages

| <i>Page Name</i>                          | <i>Definition Name</i> | <i>Usage</i>                                                                                                                                                                |
|-------------------------------------------|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Refresh Compensation Page</a> | RUNCTL_CMP015          | 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. |

### 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" (PeopleSoft HCM 9.2: Human Resources Administer Workforce); 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.)

#### Related Links

[Understanding Rules-Driven Component Defaulting](#)

## Refresh Compensation Page

Use the Refresh Compensation page (RUNCTL\_CMP015) to 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.

### Navigation

Workforce Administration > Collective Processes > Refresh Compensation

### Image: Refresh Compensation page

This example illustrates the fields and controls on the Refresh Compensation page.

Refresh Compensation

Run Control ID PER099

Report Manager

Process Monitor

Run

Language English

Report Parameters

As Of Date

Add new effective date

Correction on current Info.

Update Future Rows

Don't Absorb Changes

Process By

Group ID

All

Group ID

Find

First

1 of 1

Last

### Report Parameters

- As Of Date and Correction on current Info.

As Of Date and Add new effective date

Update Future Rows

Don't Absorb Changes

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

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.

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.)

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.

## **Related Links**

"Define Salary Plan Page" (PeopleSoft HCM 9.2: Human Resources Manage Base Compensation and Budgeting)

# Implementing the Total Rewards Statement

---

## Understanding the Administer Compensation Total Rewards Statement

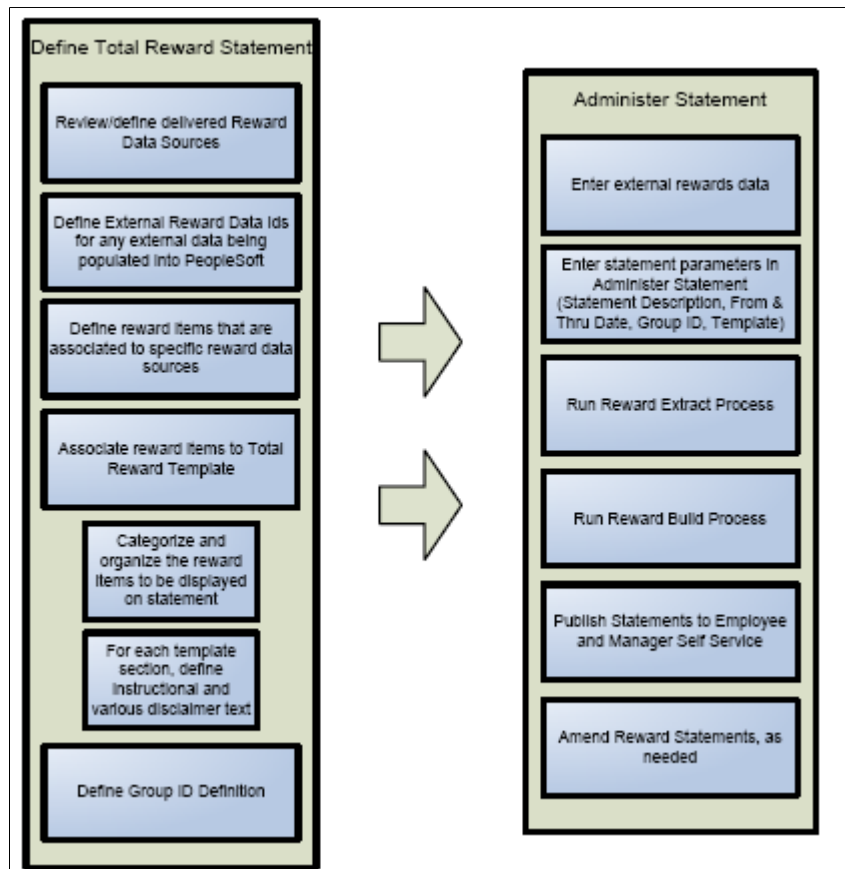
Employers recognize that compensation and benefits are integral to their ability to keep and attract employees who foster excellence in their jobs. A total rewards statement is used to increase the employee's awareness of the total value of compensation (both salary and benefits).

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

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

**Image: Total Rewards Statement Information Flow**

This graphic illustrates the process for defining and administering a total rewards statement.



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

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

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

Given the appropriate role permission, total rewards statements can be accessible by:

- Employees who can view their own statements through Employee Self Service.
- Managers who can view statements of their direct reports through Manager Self Service.
- Administrators who can view statements of individuals on the Administer My Total Rewards page.



[My Total Rewards](#)

## System-Delivered User Roles for Accessing Total Rewards Statements

Total rewards statements are available in two versions, *fluid* and *classic*. Users access either one of these statement versions depending on two factors—whether the Fluid Total Rewards feature uptake occurred, and the user roles given to them to access fluid rewards statements.

This table lists the combinations of these two factors, and describe what users expect to see when they access total rewards statements for themselves or others:

| <b>Feature Uptake</b>         | <b>Delivered User Role</b>   | <b>Expected Behavior</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Uptake of Fluid Total Rewards | Total Rewards Employee Fluid | <p>For users who have the <i>Total Rewards Employee Fluid</i> role:</p> <ul style="list-style-type: none"> <li>• The Total Rewards tile is displayed on the Employee Self Service home page.</li> <li>• They can access the <i>fluid</i> version of their own total rewards statements from the tile, the Navigator (Self Service &gt;Payroll and Compensation &gt;Total Rewards), or related actions.</li> </ul> <hr/> <p><b>Note:</b> Oracle highly recommends that users with this user role access their fluid total rewards statements using the Total Rewards tile as intended in the system. However, if they wish to access their classic total rewards statements instead, they have the option to do so by adding the My Total Rewards tile to a home page through personalization.</p> <hr/> |

| <b>Feature Uptake</b>            | <b>Delivered User Role</b>                                                         | <b>Expected Behavior</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----------------------------------|------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                  | Total Rewards Manager Fluid                                                        | <p>For users who have the <i>Total Rewards Manager Fluid</i> role:</p> <ul style="list-style-type: none"> <li>The View Total Rewards tile is displayed on the Manager Self Service home page after the user adds it to the home page through personalization.</li> <li>They can access the <i>fluid</i> version of their direct reports' total rewards statements from the tile, the Navigator (Manager Self Service &gt;Compensation and Stock &gt;View Total Rewards), or related actions.</li> </ul> |
|                                  | Total Rewards Admin Fluid                                                          | <p>For users who have the <i>Total Rewards Admin Fluid</i> role, they can access total rewards statements of selected employees from the Navigator (Compensation &gt;Total Rewards &gt;Administer Total Rewards).</p> <p>Administrators have access to the same statement version as the employees. For example, if an employee has access to the fluid version of his or her statement, an administrator who selects to view this employee's statement is given the fluid view as well.</p>            |
|                                  | My Total Rewards Fluid                                                             | <p>For users who have the <i>My Total Rewards Fluid</i> role:</p> <ul style="list-style-type: none"> <li>The My Total Rewards tile is displayed on the Employee Self Service home page after the user adds it to the home page through personalization.</li> <li>They can access the <i>classic</i> version of their own total rewards statements from the tile, the Navigator (Self Service &gt;Payroll and Compensation &gt;My Total Rewards) or related actions.</li> </ul>                          |
| No uptake of Fluid Total Rewards | My Total Rewards Fluid<br><br>(Other total rewards fluid roles are not applicable) | <p>For users who have the <i>My Total Rewards Fluid</i> role:</p> <ul style="list-style-type: none"> <li>The Total Rewards tile is displayed on the Employee Self Service home page.</li> <li>They can access the <i>classic</i> version of their own total rewards statements from the tile, the Navigator (Self Service &gt;Payroll and Compensation &gt;Total Rewards), or related actions.</li> </ul>                                                                                               |

## Understanding Reward Data Sources

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

- Foundational components to support the data extract mechanism.
- Data extraction processes that retrieve compensation data for a single total rewards statement.

- Administrative console to initiate and monitor the process of generating a total rewards statement.

One of the primary goals for the new Total Rewards functionality is to streamline the overall process and provide a more configurable table driven solution that enables the customer to define and extract employee level rewards data that is required for their total rewards statements.

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

The building blocks of the total rewards solution include:

- Reward Data Source - Table containing multiple sources of reward data.
- Reward Items - Table containing multiple items of reward data retrieved from a reward data source. Reward items are displayed on a total reward statement.
- Reward Template - Table containing multiple templates detailing the structure and layout of reward items displayed on a total reward statement.
- Reward Statement - Table containing multiple statements detailing the parameters used to generate a total reward statement for a specific group of employees for a particular reward template and period of time.

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

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

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

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

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

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

| <b><i>Element</i></b>    | <b><i>Description</i></b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Extract Temporary Table  | The system extracts a temporary table that will initially store extracted rewards data retrieved for a specific total reward statement. The Extract Temporary table has a key structure that uniquely identifies rows of reward data being retrieved. The Extract Temporary table is created in Application Designer.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Extract Table            | The system creates one or more records or record views that are used to retrieve data that will be loaded into the Extract Temporary table. Similar to a query, record views are utilized because they provide the ability to combine data from multiple tables. Record views are defined through Application Designer.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Extract Filters          | The system appends standard filter types to an SQL SELECT statement against the Extract table. Extract filters only incorporate reward statement run parameters to extract the reward data for the total reward statement being processed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Reward Item Filters      | The system uses additional filters that can be specified at the reward item level. This provides additional control to the compensation administrator to specify the data that the system will extract from the data source.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Reward Item Outputs      | <p>The system maps extracted data from the Extract Temporary table to the Statement Reward Item Detail table. Numeric reward data is mapped to these columns:</p> <ul style="list-style-type: none"> <li>• Employee Paid</li> <li>• Employer Paid</li> <li>• Units</li> <li>• Company Provided</li> <li>• Rate Per Unit</li> </ul> <p>Other detail fields can be used to display additional reward data when the employee drills down into a specific reward item.</p> <p>Some detail fields will require a description to be displayed instead of a code; therefore the Detail Record and Description fields can be specified. For example, the system extracts the field COMPANY code, but you want to display Company description from the PS_COMPANY_TBL. To do this, specify the column heading description for an output field in the detail rewards data.</p> |
| Reward Item Calculations | The system performs calculations on data in the Statement Reward Item Detail table to calculate final rewards data. Application Packages are also used to manage reward item calculations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

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

## Defining Reward Data Source Information

This topic lists the common elements that comprise a Reward Data Source and discusses how to define reward data.

## Pages Used to Define Reward Data

| <b>Page Name</b>                                                     | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                                                                                                                                                   |
|----------------------------------------------------------------------|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Define Reward Data Source - General Page</a>             | TRW_DATASRC_GNRL       | Enter a general description, a detail description, and a high level data source category for the reward data source.                                                                                                                                                                                                                           |
| <a href="#">Define Reward Data Source – Extract Tables Page</a>      | TRW_DATASRC_EXTBL      | Set up the Extract tables for the reward data source. Users will have the ability to enter a record name defined in Application Designer. They also can view the SQL text for the record view.                                                                                                                                                 |
| <a href="#">Define Reward Data Source - Extract Filters Page</a>     | TRW_DATASRC_EXFIL      | Define extract filters that are used to retrieve reward data for the statement being processed. The extract filters are used during the extract process to retrieve data from extract tables into extract temporary table. A link initiates a secondary page allowing the user to enter the extract filter for a specific extract filter type. |
| <a href="#">Define Reward Data Source – Reward Filters Page</a>      | TRW_DATASRC_RIFIL      | Create reward item filters from a field in the Extract table. Reward item filters are additional filters defined at the reward item level that enable the compensation administrator to control the rewards data that is extracted.                                                                                                            |
| <a href="#">Define Reward Data Source - Reward Output Page</a>       | TRW_DATASRC_RIOUT      | Map fields from the Extract temporary table to the Statement Reward Item Detail table. Users can also control the selection of the table to retrieve the description for a detail data field along with the Detail Grid Column label.                                                                                                          |
| <a href="#">Define Reward Data Source - Reward Calculations Page</a> | TRW_DATASRC_RICALC     | Specify the path to an application class that will perform a calculation. This page also displays the configurable matrix if the application class is retrieving rate information to perform a calculation.                                                                                                                                    |
| <a href="#">Test Reward Data Source Page</a>                         | TRW_TEST_DATASRC       | Enter reward statement run parameters to test if the reward data source is working correctly.                                                                                                                                                                                                                                                  |

## Common Elements Used in this Topic

### Data Source ID and Description

Enter an abbreviation that uniquely identifies the Reward Data Source. Then enter a description of the Reward Data Source. These fields become display only on the other pages within the component.

### Extract Temporary Table

The Extract Temporary table is a temporary table defined in Application Designer. It will be populated with data retrieved

from the Extract tables. It is the table that the system will use as the reward data source. In addition, reward item filters are created from the fields on the Extract temporary table.

## Define Reward Data Source - General Page

Use the Define Reward Data Source - General page (TRW\_DATASRC\_GNRL) to enter a general description, a detail description, and a high level data source category for the reward data source.

### Navigation

Set Up HCM > Product Related > Compensation > Total Rewards > Define Reward Data Source > General

### Image: Define Reward Data Source - General page

This example illustrates the fields and controls on the Define Reward Data Source - General page.

The screenshot shows the 'General' tab of the 'Define Reward Data Source' page. The 'Data Source ID' is 'BEN\_LEAVE\_BAL'. The '\*Description' is 'Benefits Leave Accrual Balance'. The 'Detail Description' is a text area containing: 'This data source is designed to extract Leave Accrual balances from the benefit leave accrual table, PS\_LEAVE\_ACCRUAL. In addition this table, the employee hourly rate from Job data (PS\_JOB) will be retrieved to calculate the estimated value of the employee's remaining leave balance.' The '\*Data Source Category' is a dropdown menu set to 'Benefit Leave Accrual'. The 'Data Type' is 'System Data'. The 'Last Update User ID' is 'PS' and the 'Last Update Date/Time' is '01/01/00 12:00:00AM'.

### Detail Description

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

### Data Source Category

A high level category assigned to the Reward Data Source. Listed below are the data source categories that are available for selection:

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

- Stock Administration

---

**Note:** The system uses the data source category to determine if validation is necessary when administering total rewards statements. Specifically, if the statement that is being processed contains reward items that are associated with data sources in the *External Data* category, the Validate button becomes available on the Administer Statement page for the administrator to confirm that external data has been loaded to the PeopleSoft system successfully.

---

## Define Reward Data Source – Extract Tables Page

Use the Define Reward Data Source – Extract Tables page (TRW\_DATASRC\_EXTBL) to set up the Extract tables for the reward data source.

### Navigation

Set Up HCM > Product Related > Compensation > Total Rewards > Define Reward Data Source > Extract Tables

### Image: Define Reward Data Source – Extract Tables page

This example illustrates the fields and controls on the Define Reward Data Source – Extract Tables page.

| General   <b>Extract Tables</b>   Extract Filters   Reward Filters   Reward Output   Reward Calculations |                             |                 |   |                                            |  |
|----------------------------------------------------------------------------------------------------------|-----------------------------|-----------------|---|--------------------------------------------|--|
| Data Source ID                                                                                           |                             | BEN_LEAVE_BAL   |   | Description Benefits Leave Accrual Balance |  |
| *Extract Temporary Table                                                                                 |                             | TRW_BN_TMP_LBAL |   |                                            |  |
| Reward Data Source Extract Tables ? Personalize   Find   First 1 of 1 Last                               |                             |                 |   |                                            |  |
| *Extract Table                                                                                           | Description                 | View SQL        |   |                                            |  |
| TRW_BN_LV_BAL                                                                                            | Benefits Leave Balance View | View SQL        | + | -                                          |  |

Users will have the ability to enter a record name defined in Application Designer. They also can view the SQL text for the record view.

### Extract Temporary Table

Select a target table that is used to store total rewards data to be extracted from the tables listed in the Reward Data Source Extract Tables section.

## Reward Data Source Extract Tables

### Extract Table

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

### Description

Displays the table description defined in Application Designer.

### View SQL

This link is enabled when the table is defined as a view in Application Designer. Click the View SQL link to display a

secondary page that will show the SQL statement used by the view.

## Define Reward Data Source - Extract Filters Page

Use the Define Reward Data Source - Extract Filters page (TRW\_DATASRC\_EXFIL) to define extract filters that are used to retrieve reward data for the statement being processed.

### Navigation

Set Up HCM > Product Related > Compensation > Total Rewards > Define Reward Data Source > Extract Filters

### Image: Define Reward Data Source - Extract Filters page

This example illustrates the fields and controls on the Define Reward Data Source - Extract Filters page.

| Data Source ID BEN_LEAVE_BAL                                                  |                                                                                                                                                                                                                                                                                            | Description Benefits Leave Accrual Balance |
|-------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|
| Reward Data Source Extract Filters ? Personalize   Find   1-4 of 4 First Last |                                                                                                                                                                                                                                                                                            |                                            |
| *Extract Filter Type                                                          | Extract Filter                                                                                                                                                                                                                                                                             | Edit Filter                                |
| Group ID                                                                      | EXISTS (SELECT 'X' FROM PS_GB_GRP_RES_TBL EE2 WHERE EE2.GB_GROUP_ID = %PARAM.GROUP_ID AND EE2.VERSIONGBQDM = %PARAM.GBVERSION AND EE2.EMPLID = %ALIAS.EMPLID AND EE2.EMPL_RCD = %ALIAS.EMPL_RCD)                                                                                           | Edit Filter + -                            |
| Thru Date                                                                     | %ALIAS.ACCRUAL_PROC_DT = (SELECT MAX (LV_ED.ACCRUAL_PROC_DT) FROM %PARAM.EXTRACT_TBL LV_ED WHERE LV_ED.EMPLID = %ALIAS.EMPLID AND LV_ED.EMPL_RCD = %ALIAS.EMPL_RCD AND LV_ED.COMPANY = %ALIAS.COMPANY AND LV_ED.PLAN_TYPE = %ALIAS.PLAN_TYPE AND LV_ED.ACCRUAL_PROC_DT <= %PARAM.THRUDATE) | Edit Filter + -                            |
| Employee ID                                                                   | %ALIAS.EMPLID = %PARAM.EMPLID                                                                                                                                                                                                                                                              | Edit Filter + -                            |
| Employee Record                                                               | %ALIAS.EMPL_RCD = %PARAM.EMPL_RCD                                                                                                                                                                                                                                                          | Edit Filter + -                            |

### Reward Data Source Extract Filters

The extract filters are used during the extract process to retrieve data from extract tables into extract temporary table. A link initiates a secondary page allowing the user to enter the extract filter for a specific extract filter type.

### Filter Type

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

- Group ID - Group Build is used to identify the population of employees to be processed.

- From Date - Statement from date.
- Thru Date - Statement thru date.
- From and Thru Date - Statement from and thru date.
- Employee ID - Employee ID being amended.
- Employee Record - Employee record being amended.

### Extract Filter

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

- Group ID - %PARAM.GROUP\_ID , %PARAM.GBVERSION, %ALIAS
- From Date - %PARAM.FROMDATE, %PARAM.EXTRACT\_TBL, %ALIAS
- Thru Date - %PARAM.THRUDATE, %PARAM.EXTRACT\_TBL, %ALIAS
- From and Thru Date - %PARAM.FROMDATE, %PARAM.THRUDATE, %PARAM.EXTRACT\_TBL, %ALIAS
- Employee ID - %PARAM.EMPLID, %ALIAS
- Employee Record - %PARAM.EMPL\_RCD, %ALIAS

### Edit Filter

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

## Define Reward Data Source – Reward Filters Page

Use the Define Reward Data Source – Reward Filters page (TRW\_DATASRC\_RIFIL) to create reward item filters from a field in the Extract table.

### Navigation

Set Up HCM > Product Related > Compensation > Total Rewards > Define Reward Data Source > Reward Filters

## Image: Define Reward Data Source - Reward Filters page

This example illustrates the fields and controls on the Define Reward Data Source - Reward Filters page.

| Reward Item Filters |                                     |                 |              |                                  |                                  |
|---------------------|-------------------------------------|-----------------|--------------|----------------------------------|----------------------------------|
| *Field Name         | Required                            | *Edit Type      | Prompt Table |                                  |                                  |
| 1 COMPANY           | <input type="checkbox"/>            | Prompt Table    | COMPANY_TBL  | <input type="button" value="+"/> | <input type="button" value="-"/> |
| 2 PLAN_TYPE         | <input checked="" type="checkbox"/> | Translate Table |              | <input type="button" value="+"/> | <input type="button" value="-"/> |

## Reward Item Filters

Reward item filters are additional filters defined at the reward item level that enable the compensation administrator to control the rewards data that is extracted.

### Field Name

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

- EMPLID
- EMPL\_RCD
- TRW\_STMT\_ID
- TRW\_DATASRC\_ID

### Required

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

### Edit Type

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

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

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

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

## Define Reward Data Source - Reward Output Page

Use the Define Reward Data Source - Reward Output page (TRW\_DATASRC\_RIOUT) to enable users to map fields from the Extract temporary table to the Statement Reward Item Detail table.

### Navigation

Set Up HCM > Product Related > Compensation > Total Rewards > Define Reward Data Source > Reward Output

### Image: Define Reward Data Source - Reward Output page

This example illustrates the fields and controls on the Define Reward Data Source - Reward Output page.

| General   Extract Tables   Extract Filters   Reward Filters   <b>Reward Output</b>   Reward Calculations |                   |                                            |                      |                                        |                          |                          |
|----------------------------------------------------------------------------------------------------------|-------------------|--------------------------------------------|----------------------|----------------------------------------|--------------------------|--------------------------|
| Data Source ID BEN_LEAVE_BAL                                                                             |                   | Description Benefits Leave Accrual Balance |                      |                                        |                          |                          |
| Extract Temporary Table TRW_BN_TMP_LBAL                                                                  |                   |                                            |                      |                                        |                          |                          |
| Reward Item Output Fields ?                                                                              |                   |                                            |                      | Personalize   Find   1-12 of 12   Last |                          |                          |
| Field Description                                                                                        | Field Name        | Key                                        | Detail Output Column | Detail Description Table               | Detail Description Field | Detail Grid Column Label |
| Accrual Process Date                                                                                     | ACCRUAL_PROC_DT   | Y                                          | Detail Date          |                                        | Date                     |                          |
| Company                                                                                                  | COMPANY           | Y                                          | Detail Data 1        | COMPANY_TBL                            | DESCR                    | Company                  |
| Currency Code                                                                                            | CURRENCY_CD       | N                                          |                      |                                        |                          |                          |
| Empl ID                                                                                                  | EMPLID            | Y                                          |                      |                                        |                          |                          |
| Empl Record                                                                                              | EMPL_RCD          | Y                                          |                      |                                        |                          |                          |
| Hourly Rate                                                                                              | HOURLY_RT         | N                                          | Rate Per Unit        |                                        |                          | Hourly Rate              |
| Leave Hours Balance                                                                                      | LEAVE_HRS_BALANCE | N                                          | Units                |                                        |                          | Remaining Leave Balance  |
| Plan Type                                                                                                | PLAN_TYPE         | Y                                          | Detail Data 2        | PSXLATITEM                             | XLATLONGNAME             | Description              |
| Company Provided Amount                                                                                  | TRW_CO_PROV_AMT   | N                                          | Company Provided     |                                        |                          | Estimated Value          |
| Data Source ID                                                                                           | TRW_DATASRC_ID    | Y                                          |                      |                                        |                          |                          |
| Reward Statement ID                                                                                      | TRW_STMT_ID       | Y                                          |                      |                                        |                          |                          |
| Unit of Measure                                                                                          | TRW_UOM           | N                                          | Unit of Measure      |                                        |                          | Unit of Measure          |

### Reward Item Output Fields

Users can also control the selection of the table to retrieve the description for a detail data field along with the Detail Grid Column label.

#### Field Description

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

#### Field Name

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

#### Key

Display only field that displays if the field name is a key in the Extract temporary table. Fields are populated when the Extract

table is entered on the Rewards Data Source - Extract Tables page.

### **Detail Output Column**

Fields from the Extract table can be mapped to a Detail Output Column that exists in the Statement Reward Item Detail table.

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

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

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

### **Detail Description Table**

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

### **Detail Description Field**

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

### **Detail Grid Column Label**

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

Define Reward Data Source - Reward Calculations Page

Use the Define Reward Data Source – Reward Calculations page (TRW\_DATASRC\_RICALC) to specify the path to an application class that will perform a calculation.

Navigation

Set Up HCM > Product Related > Compensation > Total Rewards > Define Reward Data Source > Reward Calculations

Image: Define Reward Data Source - Reward Calculations page

This example illustrates the fields and controls on the Define Reward Data Source - Reward Calculations page.

GeneralExtract TablesExtract FiltersReward FiltersReward OutputReward Calculations

Data Source ID BEN\_LEAVE\_BALDescription Benefits Leave Accrual Balance

Reward Item Calculations ?

PersonalizeFind1-2 of 2FirstLast

| *Sequence | *Application Class Name   | Description                 | *Method Name  | Matrix Name |
|-----------|---------------------------|-----------------------------|---------------|-------------|
| 1         | GeneralRewardCalculations | General Reward Calculations | RoundRate     |             |
| 2         | GeneralRewardCalculations | General Reward Calculations | UnitTimesRate |             |

Reward Item Calculations

This page also displays the configurable matrix if the application class is retrieving rate information to perform a calculation.

Sequence

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

Application Class Path

Enter the path of the application class to retrieve the calculation. Application classes are called to perform reward item calculations against the Statement Reward Item Detail table by the Rewards Extract process .

Description

Description of the application class.

Method Name

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

Matrix Name

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

**Note:** Application Class must be registered under Application Class Registry found under Set Up HCM >Product Related >Compensation >Utilities with the Class Usage set to REWARD CALCS.

## Test Reward Data Source Page

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

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

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

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

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

Use the Test Reward Data Source page (TRW\_TEST\_DATASRC) to enable the user to enter reward statement run parameters to test if the reward data source is working correctly.

### Navigation

Set Up HCM > Product Related > Compensation > Total Rewards > Total Reward Utilities > Test Reward Data Source

### Image: Test Reward Data Source page

This example illustrates the fields and controls on the Test Reward Data Source page.

### Test Reward Data Source

Data Source ID BEN\_LEAVE\_BAL Benefits Leave Accrual Balance

Test Parameters ?

From Date

Thru Date

Group ID

Employee ID

Employment Record

Reward Item ID

Test Reward Data Source

Delete Test & Reset Parameters

View Extract Temporary Table

View Employee Reward Item Table

Refresh

Check Messages

Generated Extract SQL ?

Personalize | Find | View All | | First 1 of 1 Last

| Description | View SQL | Execute SQL | SQL Status | Rows |
|-------------|----------|-------------|------------|------|
|             | View SQL | Execute SQL |            |      |

Reward Item Calculations ?

Personalize | Find | View All | | First 1 of 1 Last

| Application Class Name | Description | Method Name | Execute Calculation | Calculation Status |
|------------------------|-------------|-------------|---------------------|--------------------|
|                        |             |             | Execute Calculation |                    |

## Test Parameters

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

## Generated Extract SQL

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b> | A description of the Extract SQL generated for the reward data source test.                                                                                                                                                                                                                                                                                                                                                                           |
| <b>View SQL</b>    | Click this link to view the extract SQL generated for the reward data source test.                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Execute SQL</b> | Click this link to execute the SQL to populate either the Extract Temporary table or the Employee Statement Reward Item table. Extracting SQL based on an Extract table populates the Extract Temporary table. Extracting SQL based on a reward item populates the Employee Statement Reward Item table.                                                                                                                                              |
| <b>SQL Status</b>  | <p>A description of the current status of the SQL statement displayed. Listed below are the valid SQL statuses:</p> <ul style="list-style-type: none"> <li>• F (Fail) SQL encountered an issue. Click View SQL to review generated SQL and determine if the Data Source requires changes to Extract or Reward Filter.</li> <li>• N (New) SQL is new and has not been executed.</li> <li>• S (Success) SQL has been successfully processed.</li> </ul> |
| <b>Rows</b>        | Displays the number of rows inserted into the Extract Temporary table or the Employee Statement Reward Item table.                                                                                                                                                                                                                                                                                                                                    |

## Reward Item Calculations

|                               |                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Application Class Name</b> | Displays the application class for the reward calculation.                                                                                                                                                                                                                                                                                                                               |
| <b>Description</b>            | Displays the description of the application class.                                                                                                                                                                                                                                                                                                                                       |
| <b>Method Name</b>            | Displays the method name within the application class that will be executed to perform the reward calculation.                                                                                                                                                                                                                                                                           |
| <b>Execute Calculation</b>    | Click this link to enable the user to execute the reward calculation.                                                                                                                                                                                                                                                                                                                    |
| <b>Calculation Status</b>     | <p>Displays a description of the current status of the reward calculation. Listed below are the valid calculation statuses:</p> <ul style="list-style-type: none"> <li>• F (Fail) Reward calculation encountered an issue.</li> <li>• N (New) Reward calculation is new and has not been executed.</li> <li>• S (Success) Reward calculation has been successfully processed.</li> </ul> |

---

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

---

## Defining Reward Items

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

### Page Used to Define Reward Items

| <i>Page Name</i>               | <i>Definition Name</i> | <i>Usage</i>                                             |
|--------------------------------|------------------------|----------------------------------------------------------|
| <u>Define Reward Item Page</u> | TRW_RW_ITEM_DEFN       | Create new reward items or modify existing reward items. |

### Understanding Reward Items

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

### Defining Reward Items

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

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

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

- Employer Paid
- Employee Paid
- Company Provided

This is controlled by data source definition.

### Example

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

| <i>Reward Item Name</i> | <i>Employer Paid</i>                                       | <i>Employee Paid</i> | <i>Company Provided</i> |
|-------------------------|------------------------------------------------------------|----------------------|-------------------------|
| Base Salary             | Payroll for North America<br>Earnings<br><br>85,000.00 USD | -                    | -                       |

| <b><i>Reward Item Name</i></b>                   | <b><i>Employer Paid</i></b>                          | <b><i>Employee Paid</i></b>                          | <b><i>Company Provided</i></b>        |
|--------------------------------------------------|------------------------------------------------------|------------------------------------------------------|---------------------------------------|
| Medical Benefits                                 | Payroll for North America Deductions<br>2,500.00 USD | Payroll for North America Deductions<br>2,500.00 USD | -                                     |
| Stock Options                                    | -                                                    | -                                                    | Stock Administration<br>12,000.00 USD |
| Holidays                                         | -                                                    | -                                                    | (Default Values Only)<br>260.00 USD   |
| Leave Accrual                                    | Benefit Leave Accrual<br>390.00 USD                  | -                                                    | -                                     |
| Company Provided Phone/<br>Service<br>500.00 USD | -                                                    | -                                                    | External Source                       |
| Free Parking                                     | -                                                    | -                                                    | -                                     |

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

## Common Elements Used in this Topic

### Reward Item

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

### Data Source

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

## Define Reward Item Page

Use the Define Reward Item page (TRW\_RW\_ITEM\_DEFN) to create new reward items or modify existing reward items.

### Navigation

Set Up HCM > Product Related > Compensation > Total Rewards > Define Reward Item

## Image: Define Reward Item page

This example illustrates the fields and controls on the Define Reward Item page.

### Define Reward Item

Reward Item ID HXCMPBENLV

Reward Item Information ?

Find | View All

First 1 of 1 Last

\*Effective Date 01/01/1999

\*Status Active

\*Name HXCMPBENLV

\*Description HXCMPBENLV

☒ Always Display

☐ Exclude from Manager View

\*Data Source ID DUP\_LEAVE

Benefits Leave Accrual Balance

Reward Item Filters ?

Personalize | Find

First 1-2 of 2 Last

| Filter Field Name | Filter Values | Required | Edit |
|-------------------|---------------|----------|------|
| Company           |               | N        |      |
| Plan Type         | In List (50)  | Y        |      |

Detail Output Fields ?

Personalize | Find

First 1-7 of 7 Last

| Display                             | Output Field Name       |
|-------------------------------------|-------------------------|
| <input checked="" type="checkbox"/> | Date                    |
| <input checked="" type="checkbox"/> | COMPANY                 |
| <input checked="" type="checkbox"/> | Description             |
| <input checked="" type="checkbox"/> | Estimated Value         |
| <input checked="" type="checkbox"/> | Remaining Leave Balance |
| <input checked="" type="checkbox"/> | Unit of Measure         |
| <input checked="" type="checkbox"/> | Hourly Rate             |

Select All

Clear All

**Note:** Access should be provided to only those designated as compensation administrators.

### Reward Item ID

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

### Effective Date

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

### Status

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

|                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>                      | A short description that identifies a reward item. This field supports a maximum of 25 characters.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Description</b>               | A long description name that provides details regarding a reward item. This field supports a maximum of 50 characters.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Always Display</b>            | An indicator that specifies if the reward item must be displayed on the total rewards statement, even if there are no results found for the employee in the result table. The initial default value for this indicator is FALSE or deselected.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Exclude From Manager View</b> | <p>An indicator that specifies if the reward item is excluded from the manager view. When the check box is selected, managers are not able to see the reward item when viewing the direct report's total reward statement.</p> <p>By selecting this indicator, this item will only display for the employee's My Total Reward statement. The initial default value for this indicator is FALSE or deselected.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Data Source ID</b>            | <p>This is a prompt view that lists all of available data sources that can be selected for the reward item.</p> <p>All data sources that are configured in Define Reward Data Source setup component are valid data sources in the prompt. A data source can be configured to contain the employer paid amount, employee paid amount, company provided amount, or any combination of the three. It will be listed in the Detail Output Fields grid.</p> <p>If the Reward Item Filters and Detail Output Fields have not been previously specified, changes to the data source will load the Data Source Filters and Detail Output Fields grids without error.</p> <p>Changes to the data source, when rows exist in any of the Reward Item Filters or Detail Output Fields grid, will cause the following warning message to occur:</p> <p><i>Reward Item Filters/Detail Output Fields have been defined for the Data Source. This action will reload specified Reward Item Filters/Detail Output Fields based on newly selected Data Source. Do you want to continue?</i></p> <p>If you acknowledge Yes, the Reward Item Filters and Detail Output Fields are repopulated based on the new data source selected.</p> <p>If you do not wish to continue, you can cancel the action. The Reward Item Filters and Detail Output Fields stay the same, and the data source is not changed.</p> |

## Reward Item Filters

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

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

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

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

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

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

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



**Edit**

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

## Detail Output Fields

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

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

---

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

---

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

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

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

|                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Output Field Name</b> | Display grid column label of the field name defined in the data source. The label is configured in the data source definition. The value is displayed based on the user's language.                                                                                                                                                                                                                                                                                                                                       |
| <b>Display</b>           | <p>A check box that can be selected to enable the display of the column on the My Total Rewards Item Details grid. The default value is set to TRUE (selected).</p> <p>A data source can apply to Employer Paid, Employee Paid, Company Provided, or any combination of the above.</p> <p>At least one Employee Paid, Employer Paid, or Company Provided amount field has to be selected. When you click Save, the system makes sure at least one amount is selected, otherwise the system displays an error message.</p> |

## Defining Total Reward Templates

This topic provides an overview of Total Rewards templates and discusses how to define the Total Rewards Statement.

### Pages Used to Define the Total Rewards Statement

| <i>Page Name</i>                                         | <i>Definition Name</i> | <i>Usage</i>                                                                |
|----------------------------------------------------------|------------------------|-----------------------------------------------------------------------------|
| <u>Define Template Page</u>                              | TRW_TEMPLATE_DEFN      | Configure the layout of the total rewards statement.                        |
| <u>My Total Rewards Page (Preview Classic Statement)</u> | TRW_SS_STMT_NONE       | Preview the classic version of the total rewards statement for an employee. |
| <u>Total Rewards Page (Preview Fluid Statement)</u>      | TRW_SS_STMT_FL         | Preview the fluid version of the total rewards statement for an employee.   |

## Understanding the Total Rewards Template

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

When the compensation administrator creates a new template, the system automatically enters the statement's sections and all the label texts. The administrator then needs to select one or more reward items for each non-summary section. He or she can remove or add sections, change the section label text, change the section sequence, remove or add sections, and set a summary section.

Default template elements include:

- All header area label texts.
- Six section sets:

- Summary
  - Cash Pay
  - Health and Wellness
  - Retirement Savings
  - Company Stock
  - Other Benefits
- Label texts for all sections.
  - Editable chart types set to 2D Pie for the Summary section.
  - Chart check boxes deselected for all non-summary sections.
  - Grid columns label texts for all grids.

---

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

---

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

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

---

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

---

A Total Rewards Template defines how total rewards statements will be presented to employees and managers in self service transactions, and to administrators when they administer total rewards statements.

## Define Template Page

Use the Define Template page (TRW\_TEMPLATE\_DEFN) to configure the layout of the total rewards statement.

### Navigation

Set Up HCM > Product Related > Compensation > Total Rewards > Define Template

**Image: Define Template page (1 of 2)**

This example illustrates the fields and controls on the Define Template page.

## Define Template

Template ID

TR\_INT\_SYS\_PAY

Statement Information

Find | View All

First 1 of 1 Last

\*Effective Date

01/01/2015

\*Status

Active

\*Description

Total Rewards Internal Pay

\*Statement Period Label

Rewards Period

Statement Introduction

This is your Total Rewards Statement for the period selected.

☐

Display Expanded View Only

Preview Classic Statement

Preview Fluid Statement

☒

Include Employee Contributions in Totals

Statement Sections

View All

First 1 of 10 Last

\*Section Label

Summary

\*Section Order

1

Section Information

The following is a summary of all your Reward Items for the period selected.

☒

Summary

\*Grid Total Label

Reward Summary Total

\*Grid Label

Summary

☒

Grid Labels for Expanded View

Chart Settings

☒ Display Chart

Chart Type 2D Pie

**Image: Define Template page (2 of 2)**

This example illustrates the fields and controls on the Define Template page (2 of 2).

| Section Grid ?          |                                     |                                |
|-------------------------|-------------------------------------|--------------------------------|
| Column                  | Include                             | *Label Text                    |
| Item Name               | <input checked="" type="checkbox"/> | Reward Item                    |
| Employer Paid           | <input checked="" type="checkbox"/> | Employer Paid                  |
| Employee Paid           | <input checked="" type="checkbox"/> | Employee Contribution          |
| Company Provided        | <input checked="" type="checkbox"/> | Employer Provided              |
| Employer Total          | <input checked="" type="checkbox"/> | Employer Total                 |
| Employer/Employee Total | <input checked="" type="checkbox"/> | Employer-Employee Total        |
| Percent of Total        | <input checked="" type="checkbox"/> | Percent of Total Reward        |
| Contribution Split      | <input checked="" type="checkbox"/> | Employer-Employee Contribution |

| Reward Items ? |                          |        |        |
|----------------|--------------------------|--------|--------|
| View All   [A] | First                    | 1 of 1 | Last   |
| *Item          | Always Display           |        | *Order |
|                | <input type="checkbox"/> |        |        |

Employee Communication

**Note:** If you wish to switch to using the fluid version of total rewards statements, Oracle recommends that you either create new templates or insert new effective-dated rows to existing templates to generate new fluid total rewards statements.

**Template ID**

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

**Display Expanded View Only**


---

**Note:** This option applies to the classic version of total rewards statements only.

---

Select to display the total rewards template in an expanded, long page format. Scrolling is needed to view the statement in its entirety. By default, this option is deselected.

If this check box is deselected, users have the option to toggle between viewing the statement in the tabbed or expanded format by clicking the appropriate link that appears on the statement.

If this check box is selected, users can view the statement in the expanded format only.

**Preview Classic Statement**

Click to preview the classic version of the total rewards statement based on the settings of the template.

See [My Total Rewards Page \(Preview Classic Statement\)](#)

**Preview Fluid Statement**

Click to preview the fluid version of total rewards statement based on the settings of the template in a new browser window or tab.

---

**Note:** This preview link appears if the logged on user is authorized to access the fluid total rewards statement component (TRW\_SS\_STMT\_FL).

---

Unlike the classic statement preview functionality, you must first save the template before previewing the fluid version of the statement. The system displays a warning message if unsaved data on the template is detected when you click this link. To have the latest settings captured in the preview, save the template before proceeding with the preview again.

See [Total Rewards Page \(Preview Fluid Statement\)](#)

**Description**

Enter the description of the template.

**Statement Period Label**

Enter the default statement period label for the rewards period.

**Statement Introduction**

Enter the default statement introduction text.

This text is displayed under the Rewards Period drop down list on the classic total rewards statement, or under the Summary section label on the fluid total rewards statement.

**Include Employee Contributions in Totals**


---

**Note:** This option applies to the fluid version of total rewards statements only.

---

Select to include employee contributions in the overall total and section total amounts for the summary chart and section grid. By default, this option is deselected, which means that only

employer paid and employer provided amounts are included in the calculations.

If you wish to enable this option, Oracle recommends that you include for display the Employee Paid column in the Section Grid for each section where an employee contribution is expected, for example, *Summary*, *Health*, and *Wellness*.

If this option is selected, you must select to include *Employee Paid* and *Employer/Employee Total* columns in the section grid setup.

If this option is cleared, do not include the display of the *Employer/Employee Total* column in the section grid setup.

## Statement Sections

### Section Label

Enter the section label.

---

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

---

### Section Order

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

### Summary

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

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

### Statement Information

Enter the default statement introduction text for the section.

This text is displayed under the section label on the classic total rewards statement, or right above the section grid on the fluid total rewards statement.

### Grid Total Label

Enter the default grid total label for the section. This is the label for displaying the total line of the section. For instance, Summary Section has Summary Total as default label for the total line.

### Grid Label

Enter the default grid label for the section grid title.

## Grid Labels for Expanded View

For expanded view, there is a limitation. The system can't display different grid labels for different sections. Select this check box so the system will use the labels defined in this section to display the grid labels in the expanded view.

## Chart Settings

### Display Chart

Select this check box to display the summary chart on total rewards statements (both classic and fluid versions).

(For Fluid total rewards statements) When enabled, the summary chart is displayed in an expanded section when viewed on the Summary section. It is hidden in a collapsed section when viewed on non-summary sections.

### Chart Type

Select the type of chart to use on total rewards statements.

## Section Grid

### Column

Lists the columns that can be visible in the section grid. System-delivered columns are:

*Item Name* (Reward Item)

*Employer Paid* (Employer Paid)

*Employee Paid* (Employee Contribution)

*Company Provided* (Employer Provided)

*(Fluid version only) Employer Total* (Employer Total)

*(Fluid version only) Employer/Employee Total* (Employer-Employee Total)

*(Fluid version only) Percent of Total* (Percent of Total Reward)

*(Fluid version only) Contribution Split* (Employer-Employee Contribution)

### Include

---

**Note:** This option applies to the fluid version of total rewards statements only.

---

Select to display the column in the corresponding section grid.

In addition to the Item Name column, which is selected and not editable by users, include at least one other column to be displayed in the section grid.

When you save a template, the system performs validations to ensure that the right combination of columns are selected to display in a section grid. These rules are:

- If the *Employer Total* column is selected, you must select either both *Employer Paid* and *Company Provided* columns, or neither of those two columns.
- If the *Employer/Employee Total* column is selected, you must also select the *Employee Paid* column, and at least one employer-related column (for example, *Employer Paid*, *Company Provided*, or *Employer Total*).
- If the *Percent of Total* column is selected, you must also select at least one employer-related column (for example, *Employer Paid*, *Company Provided*, or *Employer Total*).

Additionally, if the Include Employee Contributions in Totals option is selected, both *Employee Paid* and *Employer/Employee Total* columns must also be selected. However, if the Include Employee Contributions in Totals option is deselected, do not select the *Employer/Employee Total* column.

- If the *Contribution Split* column is selected, you must also select the *Employee Paid* column and at least one employer-related column (for example, *Employer Paid*, *Company Provided*, or *Employer Total*).

### Label Text

Displays the default column name to be displayed on the corresponding section grid of the statement. This label can be changed manually.

## Reward Items

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

### Item

Select a reward item to display for the specified section (for example, *Cash Pay*, *Health and Wellness*, and so on). At runtime, selected items appear on the section's reward item grid of the Total Rewards statement.

See Also [Define Reward Item Page](#).

### Always Display

This will be defaulted in from the Reward Item definition into the non-summary sections.

### Order

The grid order determines the order in which the reward items will appear in the grid. For the Summary section, the order will be set to match the order of the non-summary sections.

## Employee Communication

---

**Note:** This section applies to the fluid version of total rewards statements only.

---

Use the rich text editor in this section to compose messages for users. This message, which appears on the total rewards statement for the corresponding section (for example, *Summary*, *Cash Pay*, and so on), can be used to provide news, useful information and links to users regarding the statement.

In addition to images, formatted text and links, you can personalize message content to the employee whose statement is being viewed using database fields. The system delivers these database fields that can be used when composing messages:

- %TRW\_DISP\_VW.FIRST\_NAME (Employee First Name)
- %TRW\_DISP\_VW.LAST\_NAME (Employee Last Name)
- %TRW\_DISP\_VW.NAME\_DISPLAY (Employee Display Name)
- %TRW\_DISP\_VW.JOBTITLE (Employee Job Title)
- %TRW\_DISP\_VW.ADDRESS1 (Employee Address Line 1)
- %TRW\_DISP\_VW.ADDRESS2 (Employee Address Line 2)
- %TRW\_DISP\_VW.CITY (Employee Address City)
- %TRW\_DISP\_VW.POSTAL (Employee Address Postal Code)
- %TRW\_DISP\_VW.COUNTRY (Employee Address Country)

If no content is entered in this section, the rich text display area is hidden from the corresponding section of the statement.

## My Total Rewards Page (Preview Classic Statement)

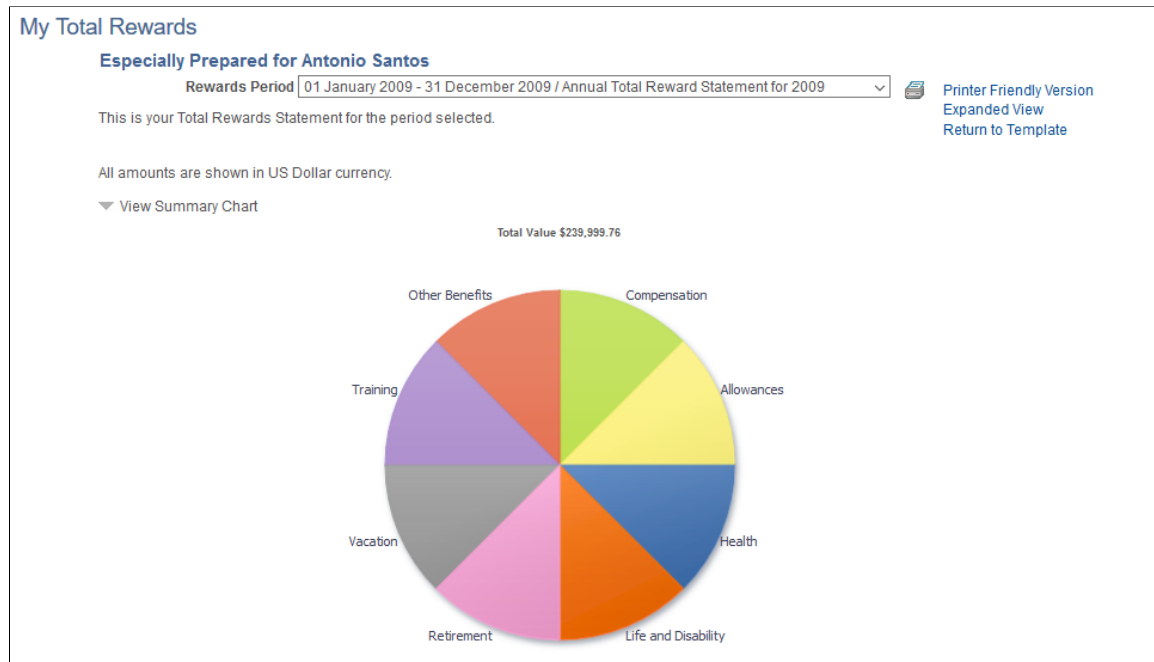
Use the My Total Rewards page (TRW\_SS\_STMT\_NONE) to preview the classic version of the total rewards statement for an employee.

### Navigation

Click the Preview Classic Statement link on the Define Template page.

**Image: My Total Rewards page (preview classic statement) (1 of 2)**

This example illustrates the fields and controls on the My Total Rewards page (preview classic statement) (1 of 2).

**Image: My Total Rewards page (preview classic statement) (2 of 2)**

This example illustrates the fields and controls on the My Total Rewards page (preview classic statement) (2 of 2).

| Summary                                                                      |                  |                       |                   |
|------------------------------------------------------------------------------|------------------|-----------------------|-------------------|
| The following is a summary of all your Reward Items for the period selected. |                  |                       |                   |
| Summary                                                                      |                  |                       |                   |
| Reward Item                                                                  | Employer Paid    | Employee Contribution | Employer Provided |
| Compensation                                                                 | 9,999.99         | 9,999.99              | 9,999.99          |
| Allowances                                                                   | 9,999.99         | 9,999.99              | 9,999.99          |
| Health                                                                       | 9,999.99         | 9,999.99              | 9,999.99          |
| Life and Disability                                                          | 9,999.99         | 9,999.99              | 9,999.99          |
| Retirement                                                                   | 9,999.99         | 9,999.99              | 9,999.99          |
| Vacation                                                                     | 9,999.99         | 9,999.99              | 9,999.99          |
| Training                                                                     | 9,999.99         | 9,999.99              | 9,999.99          |
| Other Benefits                                                               | 9,999.99         | 9,999.99              | 9,999.99          |
| <b>Reward Summary Total</b>                                                  | <b>79,999.92</b> | <b>79,999.92</b>      | <b>79,999.92</b>  |

Use this page to see how the total rewards statement is rendered based the settings of the associated template. It displays hard-coded employee rewards data.

**Printer Friendly Version**

Click to create and display a printer-friendly version of the statement in a new browser window or tab.

This printer-friendly statement is created using the BI Publisher tool.

## Expanded View or Tabbed View

Click to toggle the display of statement sections between the expanded and tabbed formats.

These links are not shown if the Display Expanded View Only field is selected on the Define Template page.

## Return to Template

Click to return to the template definition after you are done previewing the template.

See Also *PeopleTools: BI Publisher for PeopleSoft*

## Total Rewards Page (Preview Fluid Statement)

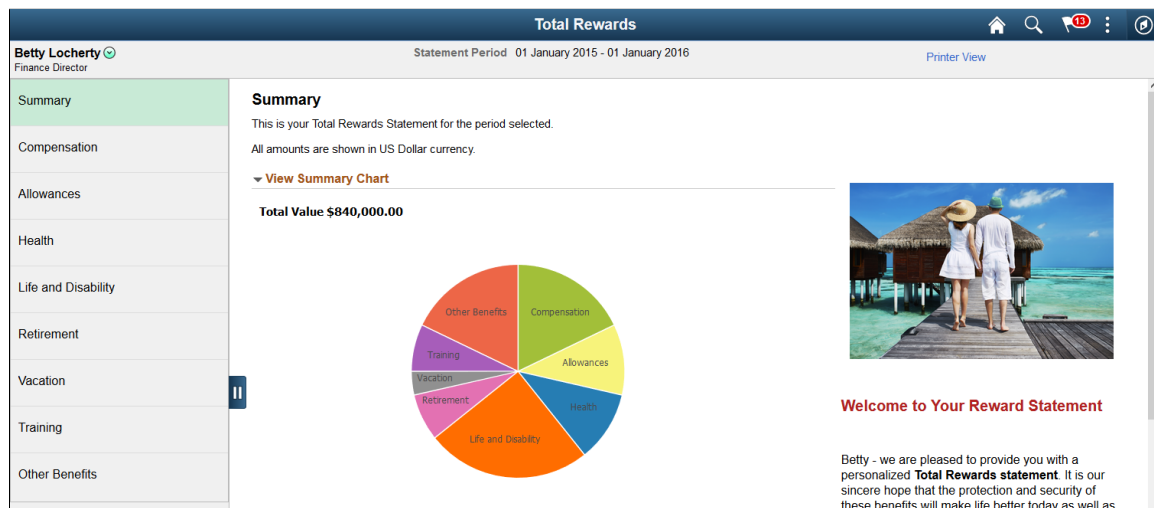
Use the Total Rewards page (TRW\_SS\_STMT\_FL) to preview the fluid version of the total rewards statement for an employee.

## Navigation

Click the Preview Fluid Statement link on the Define Template page.

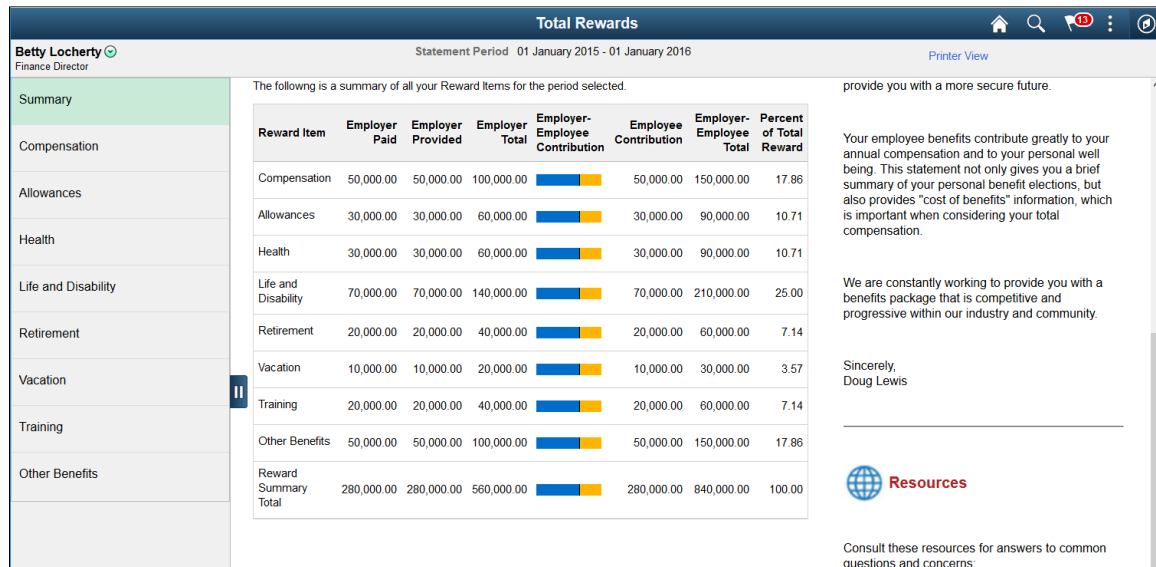
**Image: Total Rewards page (preview fluid statement) (1 of 2)**

This example illustrates the fields and controls on the My Total Rewards page (preview fluid statement) (1 of 2).



## Image: Total Rewards page (preview fluid statement) (2 of 2)

This example illustrates the fields and controls on the My Total Rewards page (preview fluid statement) (2 of 2).



Use this page to see how the total rewards statement is rendered based the settings of the associated template. On the statement, the employee name displayed is the name of the logged on user, and the effective date of the associated template is used as the begin date of the statement period. The summary chart and section grid show hard-coded employee rewards data.

To close the statement after you are done with the preview, close its browser window or tab. Do not navigate away from the statement using related actions.

### Printer View

Click to create and display a printer-friendly version of the statement in a new browser window or tab.

## Defining External Reward Data

PeopleSoft delivers the *Total Rewards External Data* data source that allows third-party compensation data to be incorporated and displayed in total reward statements. You can load external reward data into the delivered Total Rewards External Data (TRW\_EX\_TMP\_DATA) table. There are a number of PeopleTools technologies you can use to load external reward data to PeopleSoft. For more information, refer to the Total Rewards - Loading and Viewing External Reward Data (document ID: 1460363.1, <https://mosemp.us.oracle.com/epmos/faces/DocumentDisplay?id=1460363.1>) red paper that is available on My Oracle Support.

Before loading the data, you need to define one or more external data IDs that are used to identify the data.

This topic discusses how to define external reward data.

**Note:** In addition to the delivered data sources, you have the ability to create your own reward data sources and incorporate them into your rewards statements. For more information, refer to the Total Rewards - How to Create a New Reward Data Source (document ID: 1541710.1, <https://mosemp.us.oracle.com/epmos/faces/DocumentDisplay?id=1541710.1>) red paper that is also available on My Oracle Support.

## Pages Used to Define External Reward Data

| <b>Page Name</b>                        | <b>Definition Name</b> | <b>Usage</b>                                                                                                 |
|-----------------------------------------|------------------------|--------------------------------------------------------------------------------------------------------------|
| <u>Define External Reward Data Page</u> | TRW_EXTDATA_TBL        | Define an External Data ID that will identify the external data loaded into the External Rewards Data table. |
| <u>Update External Reward Data Page</u> | TRW_EXTERNAL_DATA      | Manually enter external data to the PeopleSoft system or update data that has been loaded to the system.     |

## Define External Reward Data Page

Use the Define External Reward Data page (TRW\_EXTDATA\_TBL) to define an External Data ID that will identify the external data loaded into the External Rewards Data table.

### Navigation

Set Up HCM > Product Related > Compensation > Total Rewards > Define External Reward > Define External Reward

### Image: Define External Reward Data page

This example illustrates the fields and controls on the Define External Reward Data page.

The screenshot shows the 'Define External Reward Data' page. It contains the following fields and controls:

- External Data ID:** A text field with the value '401K'.
- \*Description:** A text field with the value '401k Contribution'.
- Detail Description:** A larger text area with the value '401k Contribution'.

### External Data ID

An abbreviation that uniquely identifies external rewards data.

### Description

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

**Detail Description**

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

**Update External Reward Data Page**

Use the Update External Reward Data page (TRW\_EXTERNAL\_DATA) to manually enter external data to the PeopleSoft system or update data that has been loaded to the system.

**Navigation**

Compensation > Total Rewards > Update External Rewards Data > Update External Rewards Data

**Image: Update External Rewards Data page**

This example illustrates the fields and controls on the Update External Rewards Data page.

| External Data ID | Description       | Reward Date | Currency Code | Employee Paid Amount | Employer Paid Amount | Company Provided Amount | Units | Unit of Measure | Rate per Unit |
|------------------|-------------------|-------------|---------------|----------------------|----------------------|-------------------------|-------|-----------------|---------------|
| 1 401K           | 401k Contribution | 01/31/2010  | USD           | 800.000000           | 35.660000            |                         |       | None            |               |
| 2 401K           | 401k Contribution | 02/28/2010  | USD           | 800.000000           | 35.660000            |                         |       | None            |               |
| 3 401K           | 401k Contribution | 03/31/2010  | USD           | 800.000000           | 35.660000            |                         |       | None            |               |

**External Data ID**

An abbreviation that uniquely identifies external rewards data.

**Description**

A description of the external reward data ID.

**Rewards Date**

Date the reward was granted to the employee.

**Currency Code**

The currency for the external reward data.

**Employee Paid Amount**

The amount the employee paid or contributed to for the external reward data.

**Employer Paid Amount**

The amount the employer paid or contributed to for the external reward data.

**Company Provided Amount**

The amount the company provided for the external reward data.

**Units**

The number of units for the external reward data.

**Unit of Measure**

The Unit of Measure that displays for the external rewards data. The following is a list of the units of measures delivered:

- None
- Hours
- Days
- Weeks
- Months
- Stock Shares

## Administering the Total Rewards Statement Process

This topic provides overviews of Total Rewards Statement processing and the Reward Extract process. It also discusses how to define and process a total rewards statement.

### Pages Used to Define and Process a Total Rewards Statement

| <b>Page Name</b>                          | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                                                                                                      |
|-------------------------------------------|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Administer Statement Page</u>          | TRW_ADM_STMT           | <p>Define and process a total rewards statement.</p> <p>As the compensation administrator performs the main process steps to generate a total rewards statement, the statement status is updated and certain data fields and buttons are enabled or disabled based on the status.</p>             |
| <u>Validate External Data Page</u>        | TRW_STMT_VAL_EDATA     | <p>Identify any external reward items associated with the specified template ID.</p> <p>An external reward item is defined as any reward item associated to a reward data source that has the data source category set to EXT for External Rewards.</p>                                           |
| <u>Extract Total Rewards Data Page</u>    | TRW_EPRC_RUNCTL        | <p>Extract reward data for specific total rewards statement by generating SQL that extracts rewards data based on the reward data source attributes.</p>                                                                                                                                          |
| <u>Build Total Reward Statements Page</u> | TRW_BPRC_RUNCTL        | <p>Build total rewards statements for employees.</p>                                                                                                                                                                                                                                              |
| <u>Publish Statements Page</u>            | TRW_STMT_PUBLISH       | <p>Publish all built total rewards statements to the employee self service My Total Rewards page.</p>                                                                                                                                                                                             |
| <u>Amend Statements Page</u>              | TRW_STMT_AMEND         | <p>Amend or cancel individual employee total rewards statements.</p>                                                                                                                                                                                                                              |
| <u>Administer Statement Messages Page</u> | TRW_STMT_MESSAGES      | <p>Display any warnings or errors generated by the Rewards Extract and Rewards Build processes.</p> <p>The compensation administrator is expected to review warnings and error messages and cancel the statement to make any adjustments to the configuration or data to correct the problem.</p> |

| <b>Page Name</b>              | <b>Definition Name</b> | <b>Usage</b>                                                                                  |
|-------------------------------|------------------------|-----------------------------------------------------------------------------------------------|
| <u>Statement Summary Page</u> | TRW_STMT_SUMMARY       | Display statistical summary information on what has been processed to date for the statement. |

## Understanding the Processing of Total Rewards Statements

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

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

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

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

## Understanding the Reward Extract Process

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

| <b>Step</b>                                               | <b>Actions</b>                                                                                                                                                                                              |
|-----------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Performs critical validations against reward data sources | The reward data sources utilize records and views defined in Application Designer. The system performs validations to ensure that records and views exist and are defined properly to retrieve reward data. |
| Processes group IDs                                       | Retrieves the employee population for the statement being generated.                                                                                                                                        |

| <b>Step</b>                                  | <b>Actions</b>                                                                                                                                                                                                                                                                                                                                                                                                          |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Initializes employee reward statement tables | <p>The system populates the these tables:</p> <ul style="list-style-type: none"> <li>Employee Statement Table (TRW_EE_STMT)</li> <li>Employee Statement Jobs Included Table (TRW_EE_STMT_JBI)</li> </ul>                                                                                                                                                                                                                |
| Performs employee validations                | <p>If the employee has multiple statements, the system validates the From and Thru date being processed. If true, the system generates warnings.</p> <p>If the employee has one HR primary job, the system performs a validation. If true, the system generates an error.</p> <p>The system uses the primary job to retrieve the currency the employee's statement is displayed in.</p>                                 |
| Sets Multiple Jobs Indicator                 | If an employee has multiple jobs, the system displays the job title in the reward item detail.                                                                                                                                                                                                                                                                                                                          |
| Generates SQL for the Extract table          | <p>For each unique reward data source associated with the template, the Reward Extract process constructs SQL to extract reward data from the Extract table(s) defined in the reward data source.</p> <p>The SQL constructed uses the extract filters to only retrieve rewards data for the statement being processed.</p> <p>The SQL also populates the Extract Temporary table defined in the reward data source.</p> |
| Executes SQL for the Extract table           | For each unique reward data source, the system populates the respective Extract Temporary table.                                                                                                                                                                                                                                                                                                                        |
| Generates SQL for reward items               | <p>For each reward item in the template, the system generates SQL to the extract reward item from the Reward Data Source Extract Temporary table.</p> <p>The SQL, when constructed, uses the reward item filters to only retrieve reward data for the specific reward item.</p> <p>This SQL also populates the Employee Statement Reward Item table (TRW_EE_STMT_ITM).</p>                                              |
| Executes SQL for reward items                | For each reward item SQL generated, the system executes the statement to populate the Employee Statement Reward Item table (TRW_EE_STMT_ITM).                                                                                                                                                                                                                                                                           |
| Calculates reward items                      | The system performs any reward item calculations against the Employee Statement Reward Item table (TRW_EE_STMT_ITM). Note: The system deletes the data in the Extract Temporary tables for the statement being processed.                                                                                                                                                                                               |
| Validates rewards item details               | The system generates warning messages for reward items that were not extracted for the statement.                                                                                                                                                                                                                                                                                                                       |
| Updates extract statistics                   | The system populates the Reward Summary table (TRW_STMT_RWDSUM). The system counts and summarizes the number of employees with extracted reward items.                                                                                                                                                                                                                                                                  |

| <b>Step</b>                                                             | <b>Actions</b>                                                                                                                                                                                                                                                                        |
|-------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Updates the statement status                                            | <p>If errors occurred, the system sets the Statement Status to Reward Extract Error.</p> <p>The system also enables the Check Messages link on the Administer Statement page.</p> <p>If there are no errors, the system sets the Statement Status set to Reward Extract Complete.</p> |
| Generates a detailed output log file accessible through Process Monitor | See TRW_RWD_EXTRACT_INFO.txt                                                                                                                                                                                                                                                          |

---

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

---

## Administer Statement Page

Use the Administer Statement page (TRW\_ADM\_STMT) to define and process a total rewards statement.

As the compensation administrator performs the main process steps to generate a total rewards statement, the statement status is updated and certain data fields and buttons are enabled or disabled based on the status.

### Navigation

- (Classic) Compensation >Total Rewards >Administer Statement >Administer Statement
- (Fluid) Select the Workforce Administrator home page and click the Compensation Administration tile. On the left navigation, select Total Rewards >Administer Total Rewards

**Image: Administer Statement page**

This example illustrates the fields and controls on the Administer Statement page.

**Administer Statement**

Statement ID: STATEMENT02\_P

\*Description: Total Rewards Statement 2011

\*From Date: 01/01/2011

\*Thru Date: 12/31/2011

\*Group ID: TRW\_2011\_INT Tot Rewards 2011 Int Data Grp

\*Template ID: TR\_INT\_SYS\_PAY Total Rewards Internal Pay

**Main Steps** ?

**Exception Steps** ?

Refresh Check Messages View Statement Summary

**Status History** Personalize Find View All First 1-5 of 6 Last

| Status                      | Status Date and Time | Name           |
|-----------------------------|----------------------|----------------|
| Amend Build Complete        | 10/31/12 3:11PM      | Betty Locherty |
| Reward Statements Published | 06/26/12 11:53PM     | Betty Locherty |
| Build Rewards Complete      | 06/26/12 11:52PM     | Betty Locherty |
| Extract Rewards Complete    | 06/26/12 11:51PM     | Betty Locherty |
| External Data Validated     | 06/26/12 11:50PM     | Betty Locherty |

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

**Statement ID**

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

**Description**

A description of the total rewards statement.

**From Date and Thru Date**

These fields are enabled if the Status field is Defined or External Data Validated. The From and Thru Date fields identify the period use by the Rewards Extract process to extract rewards information that will be displayed on the total rewards statement.

**Group ID**

Group ID defines the population of employee who will be processed for the My Total Rewards statement.

**Template ID**

This field identifies the structures of the total rewards statement; specifically, the reward items that will be extracted and displayed on the total rewards statement.

**Statement Status**

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

- *Defined* - Initial status after the Statement ID has been saved.

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

### **Refresh**

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

### **Check Message**

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

Error messages have to be resolved before the process can move forward. Warning messages provide insight into potential issues with the total rewards statement processing.

## View Statement Summary

Displayed if the statement status is not defined or canceled.

The system transfers the compensation administrator to the Statement Summary page, which details various statistics for the statements being processed.

---

**Note:** Be sure to access this link to identify and troubleshoot issues. Information provided here serves as a sanity check for employees that were processed and rewards items that were extracted for them.

---

## Main Steps



**Validate**

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



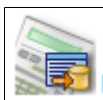
**Extract**

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



**Build**

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



**Publish**

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

---

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

---

## Exception Steps



**Cancel**

The Cancel icon is enabled if the statement status is not equal to Defined. The system displays a statement confirmation page indicating to the compensation administrator the impact of canceling the statement. Depending on the stage in the process during which the Cancel action is triggered, it either deletes any data that is extracted or statement that is built, and returns to the beginning of the process where you can enter statement parameters.



**Amend**

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

## Validate External Data Page

Use the Validate External Data page (TRW\_STMT\_VAL\_EDATA) to identify any external reward items associated with the specified template ID.

An external reward item is defined as any reward item associated to a reward data source that has the data source category set to EXT for External Rewards.

### Navigation

Click the Validate button on the Administer Statement page.

### Image: Validate External Data page

This example illustrates the fields and controls on the Validate External Data page.

| External Rewards Items |                          |
|------------------------|--------------------------|
| Reward Item ID         | Description              |
| BONUS_EARNINGS         | Bonus Earnings           |
| CAR_ALLOW              | Car Allowance            |
| CHILDCARE              | Childcare                |
| COMMUTER_ALLOW         | Commuter Allowance       |
| EXEC_INS               | Executive Life Insurance |

**Transaction Instructions**

This statement's template is associated to external data via the reward items listed in the specified table.  
 External data should be validated.  
 To confirm, select OK.  
 To cancel, select Cancel.

OK Cancel

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

External Reward Items

|                |                                                                                       |
|----------------|---------------------------------------------------------------------------------------|
| Reward Item ID | An abbreviation that uniquely identifies the total rewards statement to be generated. |
| Description    | A description of the total rewards statement.                                         |

Extract Total Rewards Data Page

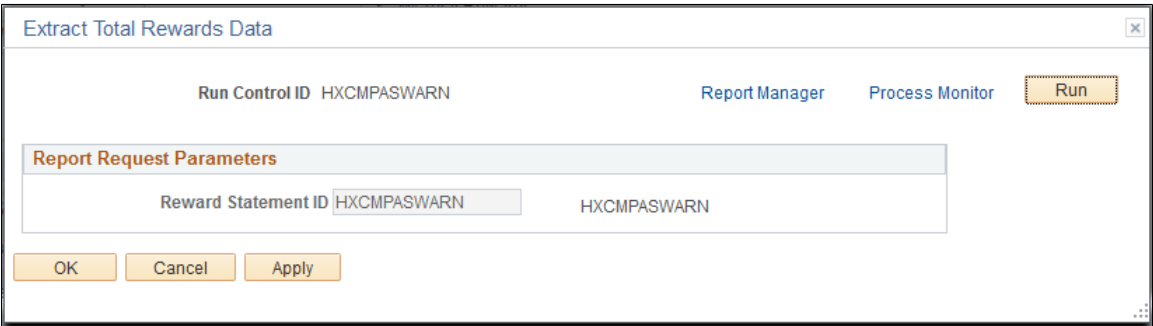
Use the Extract Total Rewards Data page (TRW\_EPRC\_RUNCTL) to extract reward data for specific total rewards statement by generating SQL that extracts rewards data based on the reward data source attributes.

Navigation

Click the Extract button on the Administer Statement page.

Image: Extract Total Rewards Data page

This example illustrates the fields and controls on the Extract Total Rewards Data page.



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

|                     |                                                                                       |
|---------------------|---------------------------------------------------------------------------------------|
| Reward Statement ID | An abbreviation that uniquely identifies the total rewards statement to be generated. |
| Description         | A description of the total rewards statement.                                         |

Amend Statement for Employees

|                  |                                                                       |
|------------------|-----------------------------------------------------------------------|
| Employee ID      | Displays the ID of the employee who is ready to be extracted.         |
| Name             | Displays the name of the employee.                                    |
| Statement Status | Displays the current status of the employee’s total reward statement. |

**Amend Status**

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

**Publish Statements Page**

Use the Publish Statements page (TRW\_STMT\_PUBLISH) to publish all built total rewards statements to the employee self service My Total Rewards page.

**Navigation**

Click the Publish button on the Administer Statement page.

**Image: Publish Statements page**

This example illustrates the fields and controls on the Publish Statements page.

The screenshot shows a web application window titled "Publish Statements". Inside, there is a table with the following data:

| Employee ID | Name           | Statement Status | Amend Status |
|-------------|----------------|------------------|--------------|
| KU0007      | Betty Locherty | Built            | Publish      |

Below the table, there is a section titled "Transaction Instructions" with the following text:

Publish to self service My Total Rewards page.  
To confirm, select OK.  
To cancel, select Cancel.

At the bottom of the window, there are two buttons: "OK" and "Cancel".

**Amend****Employee ID**

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

**Name**

Displays the name of the employee.

**Statement Status**

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

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

- (For employee) Self Service >Payroll and Compensation >My Total Rewards
- (For manager) Manager Self Service >Compensation and Stock >View Total Rewards
- (For administrator) Compensation >Total Rewards >Administer My Total Rewards

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

## Amend Statements Page

Use the Amend Statements page (TRW\_STMT\_AMEND) to this page enables the compensation administrator to amend or cancel individual employee total rewards statements.

### Navigation

Click the Amend button on the Administer Statement page. The button is available when the statement has reached the Published status stage.

### Image: Amend Statements page

This example illustrates the fields and controls on the Amend Statements page.

**Amend Statements**

Amend Statement for Employees ? Personalize | Find | View All | [List Icon] First 1 of 1 Last

| Employee ID | Name           | Statement Status | *Amend Indicator |
|-------------|----------------|------------------|------------------|
| KU0007      | Betty Locherty | Published        | Build            |

**Transaction Instructions**

If the Amend Indicator is set to Cancel, the employee's reward statement will be cancelled. If necessary, a cancelled reward statement can still be amended by setting the Amend Indicator to Extract.

This Amend request will reprocess employee statements as indicated:  
 Select OK to Accept  
 Select Cancel to Decline

OK Cancel

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

### Amend Statement for Employees

#### Employee ID

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

#### Name

Displays the name of the Employee.

#### Statement Status

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

#### Amend Indicator

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

- Extract
- Build

- Publish
- Cancel

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

## Administer Statement Messages Page

Use the Administer Statement Messages page (TRW\_STMT\_MESSAGES) to display any warnings or errors generated by the Rewards Extract and Rewards Build processes.

The compensation administrator is expected to review warnings and error messages and cancel the statement to make any adjustments to the configuration or data to correct the problem.

### Navigation

Click the Check Messages link on the Administer Statement page.

### Image: Administer Statement Messages page

This example illustrates the fields and controls on the Administer Statement Messages page.

Check Messages

### Administer Statement Messages

The rewards extract or build processes have generated warning or error messages. All errors must be resolved for the process to proceed and complete successfully. All warning messages should be reviewed.

| Employee ID | Message Set Number | Message Number | Description                                                                                                                                                                      |
|-------------|--------------------|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| KU0209      | 1020               | 1622           | Error: Unable to publish a reward statement. The employee does not have any reward items extracted for their reward statement, therefore a reward statement cannot be published. |

Return

## Messages

### Employee ID

Display-only field that identifies the Employee ID to which the message refers. Note: The employee ID field is hidden if no employee ID is populated.

|                           |                                                                                                                                             |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Message Set Number</b> | Display-only field that displays the Message Set Number of the message.                                                                     |
| <b>Message Number</b>     | Display-only field that displays the Message Number of the message.                                                                         |
| <b>Description</b>        | Display-only field that displays the long description of the Message Catalog entry for the Message Set Number and Message Number displayed. |

## Statement Summary Page

Use the Statement Summary page (TRW\_STMT\_SUMMARY) to display statistical summary information on what has been processed to date for the statement.

### Navigation

Click the View Statement Summary link on the Administer Statement page.

### Image: Statement Summary page

This example illustrates the fields and controls on the Statement Summary page.

The screenshot shows the 'Statement Summary' page. At the top, it says 'The rewards extract or build processes have generated summary information.' Below this is a section titled 'Employee Process Counts' with the following data:

|           |    |                |   |
|-----------|----|----------------|---|
| Processed | 11 | Extracted      | 0 |
| Cancelled | 0  | Built          | 1 |
| Published | 10 | Publish Errors | 0 |

Below the counts is a table titled 'By Reward Item'. It has columns for 'Section Label', 'Reward Item ID', 'Reward Item', and 'Total Extracted Employees'. The table contains the following data:

| Section Label       | Reward Item ID  | Reward Item          | Total Extracted Employees |
|---------------------|-----------------|----------------------|---------------------------|
| Allowances          | CAR_ALLOW       | Car Allowance        | 1                         |
| Allowances          | COMMUTER_ALLOW  | Commuter Allowance   | 5                         |
| Allowances          | HOUSING_ALLOW   | Housing Allowance    | 1                         |
| Life and Disability | ADD_INS_P       | AD&D Insurance       | 11                        |
| Life and Disability | BASICLIFE_INS_P | Basic Life Insurance | 11                        |

At the bottom left of the page is a 'Return' button. The page also includes navigation links like 'Personalize', 'Find', 'View All', and a pagination control showing 'First', '1-5 of 24', and 'Last'.

### Employee Process Counts

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

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

|                                  |                                                                                                                                                         |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Built</b>                     | Displays the total number of employees who have the statement build date populated in the Employee Statement record for the statement ID displayed.     |
| <b>Published</b>                 | Displays the total number of employees who have the statement published date populated in the Employee Statement record for the statement ID displayed. |
| <b>Cancelled</b>                 | Displays the total number of employees who have an employee statement status set to CAN for Canceled for the statement ID displayed.                    |
| <b>By Reward Item</b>            |                                                                                                                                                         |
| <b>Section Label</b>             | Description of the section.                                                                                                                             |
| <b>Reward Item ID</b>            | ID of the reward item.                                                                                                                                  |
| <b>Reward Item</b>               | Description of the reward item.                                                                                                                         |
| <b>Total Extracted Employees</b> | Displays the total number of distinct employees who have extracted data for the reward item.                                                            |

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## Viewing and Printing the Total Rewards Statement

This topic provides an overview of the total rewards statement functionality and discusses how to access and interact with it.

---

**Note:** This topic pertains to the *classic* version of the total rewards statement. For information about the *fluid* version of the statement, refer to the [Using the PeopleSoft Fluid User Interface to View Total Rewards Statements](#) topic. For information about user roles that are delivered for accessing different statement versions, refer to the [System-Delivered User Roles for Accessing Total Rewards Statements](#) topic.

---

## Pages Used to View the Total Rewards Statement

| <b>Page Name</b>                             | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                            |
|----------------------------------------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Total Rewards Page (Classic)</a> | TRW_SS_STMT_NONE       | Review compensation and benefit summary information for selected reward periods. As an employee, you can also view a summary chart that shows graphical representation of compensation and benefit summary information. |

| <b>Page Name</b>                                         | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----------------------------------------------------------|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View Total Rewards Page                                  | TRW_SS_STMT_NONE       | <p>Review compensation and benefit summary information of selected direct reports and reward periods. As a manager, you can also view a summary chart that shows graphical representation of compensation and benefit summary information.</p> <hr/> <p><b>Note:</b> The page layout and functionality of the manager-facing View Total Rewards page and the employee-facing <u>Total Rewards Page (Classic)</u> are basically identical. One difference is that the employee photo appears when the page is viewed by a manager.</p> <hr/>                                                                                                                                 |
| Administer My Total Rewards Page                         | TRW_SS_STMT_NONE       | <p>Review compensation and benefit summary information of selected employees and reward periods. As a compensation administrator, you can also view a summary chart that shows graphical representation of compensation and benefit summary information.</p> <p>The page layout and functionality of the Administer My Total Rewards page and <u>Total Rewards Page (Classic)</u> are identical.</p> <p>Administrators have access to the same statement version as the employees. For example, if an employee has access to the fluid version of his or her statement, an administrator who selects to view this employee's statement is given the fluid view as well.</p> |
| <u>My Total Rewards Page (Preview Classic Statement)</u> | TRW_SS_STMT_NONE       | <p>Preview compensation and benefit summary information of an employee and selected review periods.</p> <p>The page layout and functionality of the preview statement page and <u>Total Rewards Page (Classic)</u> are identical.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <u>Reward Item Details Page (Classic)</u>                | TRW_SS_STMT_DETAIL     | <p>View details for each reward item that is displayed as a link.</p> <p>When selected, the system takes the user to a pop-up window that contains further information about the Item. The additional information consists of the individual pay items that roll into the Reward Item. The data displayed here is configured by the administrator in the Define Reward Data Source and Define Reward Item pages.</p>                                                                                                                                                                                                                                                        |

## Understanding the Total Rewards Statement

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

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

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

### Employees with Multiple Jobs

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

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

## Total Rewards Page (Classic)

Use the Total Rewards page (TRW\_SS\_STMT\_NONE) to review compensation and benefit summary information for a particular reward period.

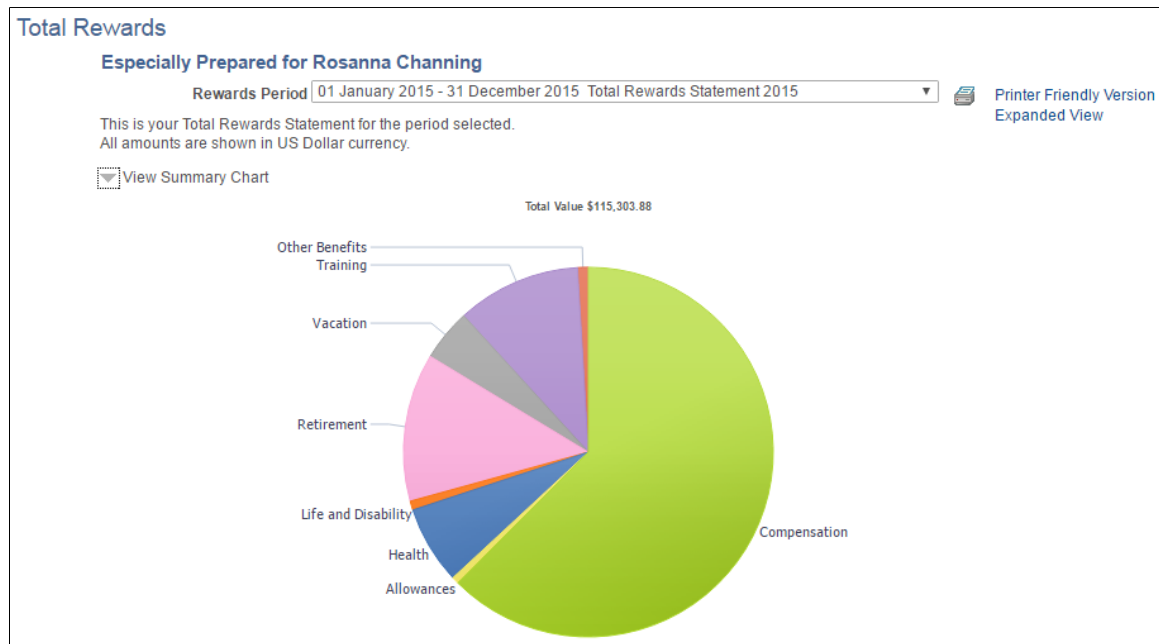
You can also view a summary chart that shows graphical representation of compensation and benefit summary information.

### Navigation

- Self Service > Payroll and Compensation > My Total Rewards > My Total Rewards (Total Rewards page for employees)
- Manager Self Service > Compensation and Stock > View Total Rewards > Total Rewards (View Total Rewards page for managers)
- Compensation > Total Rewards > Administer My Total Rewards > Administer My Total Rewards (Administer My Total Rewards page for administrators)

**Image: Total Rewards page (1 of 2)**

This example illustrates the fields and controls on the Total Rewards page (1 of 2).

**Image: Total Rewards page (2 of 2)**

This example illustrates the fields and controls on the Total Rewards page (2 of 2).

| Summary                                                                      | Compensation     | Allowances            | Health            | Life and Disability | Retirement | Vacation | Training | Other Benefits |
|------------------------------------------------------------------------------|------------------|-----------------------|-------------------|---------------------|------------|----------|----------|----------------|
| The following is a summary of all your Reward Items for the period selected. |                  |                       |                   |                     |            |          |          |                |
| Summary                                                                      |                  |                       |                   |                     |            |          |          |                |
| Reward Item                                                                  | Employer Paid    | Employee Contribution | Employer Provided |                     |            |          |          |                |
| Compensation                                                                 | 72,032.88        | 0.00                  | 0.00              |                     |            |          |          |                |
| Allowances                                                                   | 720.00           | 0.00                  | 0.00              |                     |            |          |          |                |
| Health                                                                       | 6,442.32         | 1,434.24              | 0.00              |                     |            |          |          |                |
| Life and Disability                                                          | 221.04           | 688.20                | 0.00              |                     |            |          |          |                |
| Retirement                                                                   | 6,045.24         | 8,889.96              | 0.00              |                     |            |          |          |                |
| Vacation                                                                     | 0.00             | 0.00                  | 5,250.00          |                     |            |          |          |                |
| Training                                                                     | 10,000.00        | 0.00                  | 2,500.00          |                     |            |          |          |                |
| Other Benefits                                                               | 0.00             | 0.00                  | 1,080.00          |                     |            |          |          |                |
| <b>Reward Summary Total</b>                                                  | <b>95,461.48</b> | <b>11,012.40</b>      | <b>8,830.00</b>   |                     |            |          |          |                |

If no statements are available for the employee being viewed, the system displays the “There are no Total Rewards Statements available for your review” message on this page.

**Rewards Period**

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

**Printer Friendly Version**

Click to launch a printer friendly version (in a long page view) of the total rewards statement in a new browser window. The system generates the statement report using the Oracle Business

Intelligent Publisher (BI Publisher or BIP). The template of the report is in rich text format and can be modified to suit your needs without customization.

The report definition ID for the Total Rewards Statement report is TRW\_STATEMENT.

For more information about creating RTF report templates, see the product documentation for *PeopleTools: BI Publisher for PeopleSoft*.

**Expanded View and Tabbed View**

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

**View Summary Chart**

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

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

## Reward Item Details Page (Classic)

Use the Reward Item Details page (TRW\_SS\_STMT\_DETAIL) to view details for each Reward Item that is displayed as a link.

When selected, the system takes the user to a pop-up window that contains further information about the Item. The additional information consists of the individual pay items that roll into the Reward Item. The data displayed here is configured by the administrator in the Define Reward Data Source and Define Reward Item pages.

**Navigation**

Click a reward item link from a section grid on the Total Rewards page.

### Image: Reward Item Details page

This example illustrates the fields and controls on the Reward Item Details page.

| Reward Item Details   |                           |                      |                 |
|-----------------------|---------------------------|----------------------|-----------------|
| Base Payroll Earnings |                           |                      |                 |
| Pay Check Date        | Company                   | Earnings Description | Earnings Amount |
| 12/31/2015            | Global Business Institute | Regular              | 1,055.07        |
| 12/31/2015            | Global Business Institute | Holiday (Statutory)  | 280.00          |
| 12/31/2015            | Global Business Institute | Regular              | 1,318.84        |
| 12/31/2015            | Global Business Institute | Regular              | 1,055.08        |
| 12/31/2015            | Global Business Institute | Regular              | 1,038.84        |
| 12/31/2015            | Global Business Institute | Regular              | 1,318.84        |
| 11/30/2015            | Global Business Institute | Regular              | 1,444.43        |
| 11/30/2015            | Global Business Institute | Regular              | 1,444.45        |
| 11/30/2015            | Global Business Institute | Regular              | 1,444.45        |
| 11/30/2015            | Global Business Institute | Regular              | 288.89          |
| 11/30/2015            | Global Business Institute | Regular              | 884.45          |
| 11/30/2015            | Global Business Institute | Holiday (Statutory)  | 560.00          |
| Return                |                           |                      |                 |

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

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

## Using the PeopleSoft Fluid User Interface to View Total Rewards Statements

This topic discusses how employees and managers access the fluid version of total rewards statements to review earnings, benefits, and other compensation information of themselves and their direct reports.

**Note:** Users must be members of the *Total Rewards Employee Fluid*, *Total Rewards Manager Fluid*, or *Total Rewards Admin Fluid* user role to interact with the fluid version of total rewards statements. Refer to the [System-Delivered User Roles for Accessing Total Rewards Statements](#) section for more information.

## Pages Used to View Total Rewards Statements Using the PeopleSoft Fluid User Interface

| Page Name                          | Definition Name                                                                                   | Usage                               |
|------------------------------------|---------------------------------------------------------------------------------------------------|-------------------------------------|
| <a href="#">Total Rewards Tile</a> | HC_TRW_SS_STMT_FLU_GBL (this is the cref for the tile)<br><br>TRW_TILE_FL (page for dynamic data) | View your total rewards statements. |

| <b>Page Name</b>                | <b>Definition Name</b>                                 | <b>Usage</b>                                                                                                                                                         |
|---------------------------------|--------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| My Total Rewards Tile           | HC_TRW_SS_STMT_FLU (this is the cref for the tile)     | View the classic version of your total rewards statements.<br><br>This tile is available to users who do not have the <i>Total Rewards Employee Fluid</i> user role. |
| <u>View Total Rewards Tile</u>  | HC_TRW_STMT_MSS_FL_GBL (this is the cref for the tile) | View total rewards statements of your direct reports.                                                                                                                |
| <u>Total Rewards Page</u>       | TRW_SS_STMT_FL                                         | Review your or your direct reports' earnings, benefits, and other compensation information for selected review periods.                                              |
| <u>Reward Item Details Page</u> | TRW_STMT_DTL_SCF                                       | View the list of rows that roll up to the selected reward item total.                                                                                                |

## Total Rewards Tile

Use the Total Rewards tile (HC\_TRW\_SS\_STMT\_FLU\_GBL) to view your total rewards statements.

### Navigation

Select the Employee Self Service home page. The Total Rewards tile is displayed on this home page by default.

The Total Rewards tile may also be added and become available on a custom home page that you create through personalization.

### Image: Total Rewards tile

This example illustrates the Total Rewards tile.



The Total Rewards tile displays the name of the latest statement. It is the default statement to be presented after total rewards pages are loaded successfully.



[Fluid Total Rewards - Image Highlights](#)



[Fluid Total Rewards: Additional Columns - Image Highlights](#)

## View Total Rewards Tile

Use the View Total Rewards tile (HC\_TRW\_STMT\_MSS\_FL\_GBL) to view total rewards statements of your direct reports.

### Navigation

Select the Manager Self Service home page. The View Total Rewards tile is displayed on this home page by default.

The View Total Rewards tile may also be added and become available on a custom home page that you create through personalization.

### Image: View Total Rewards tile

This example illustrates the View Total Rewards tile.



As a manager, you need to select a direct report from the person selector page for whom you wish to view the total rewards statement.

## Total Rewards Page

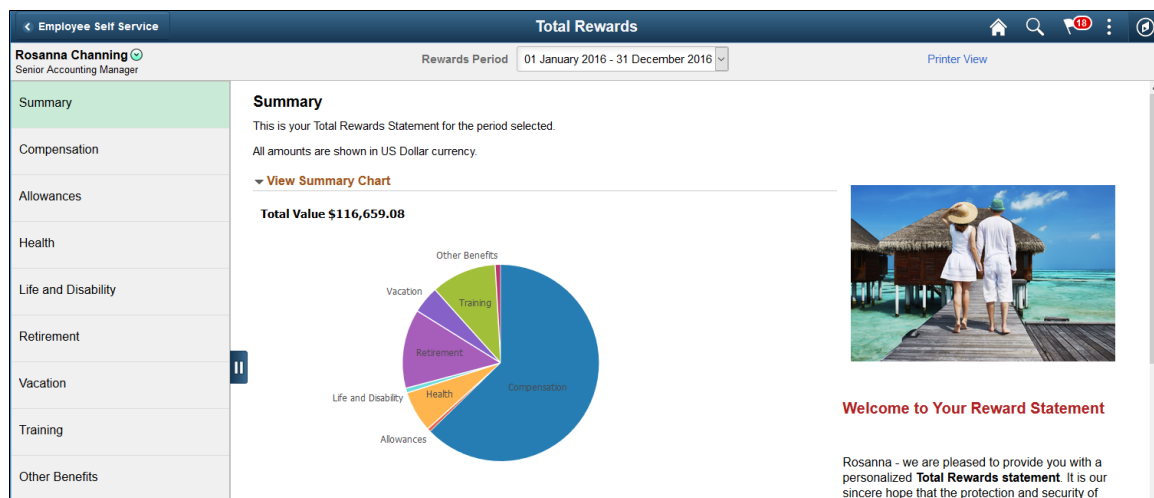
Use the Total Rewards page (TRW\_SS\_STMT\_FL) to review employee's earnings, benefits, and other compensation information for selected review periods.

## Navigation

- (Employee or Manager) Click the Total Rewards tile or View Total Rewards tile on a fluid home page.
- (Administrator) Compensation >Total Rewards >Administer Total Rewards
- (Administrator) Select the Workforce Administrator home page and click the Compensation Administration tile. On the left navigation, select Total Rewards >Administer Total Rewards.

### Image: (Monitor) Total Rewards page (1 of 2)

This example illustrates the fields and controls on the Total Rewards page (viewed by an employee). The page is displayed on a monitor or large form factor for all panels to be shown simultaneously (1 of 2).



### Image: (Monitor) Total Rewards page (2 of 2)

This example illustrates the fields and controls on the Total Rewards page (viewed by an employee). The page is displayed on a monitor or large form factor for all panels to be shown simultaneously (2 of 2).

| Summary             | The following is a summary of all your Reward Items for the period selected. |                  |                   |                   |                                       |                          |                                |                               |
|---------------------|------------------------------------------------------------------------------|------------------|-------------------|-------------------|---------------------------------------|--------------------------|--------------------------------|-------------------------------|
|                     | Reward Item                                                                  | Employer Paid    | Employer Provided | Employer Total    | Employee-<br>Employee<br>Contribution | Employee<br>Contribution | Employer-<br>Employee<br>Total | Percent<br>of Total<br>Reward |
| Compensation        | Compensation                                                                 | 73,152.88        | 0.00              | 73,152.88         |                                       | 0.00                     | 73,152.88                      | 62.71                         |
| Allowances          | Allowances                                                                   | 720.00           | 0.00              | 720.00            |                                       | 0.00                     | 720.00                         | 0.62                          |
| Health              | Health                                                                       | 6,442.32         | 0.00              | 6,442.32          |                                       | 1,434.24                 | 7,876.56                       | 6.75                          |
| Life and Disability | Life and Disability                                                          | 221.04           | 0.00              | 221.04            |                                       | 688.20                   | 909.24                         | 0.78                          |
| Retirement          | Retirement                                                                   | 6,140.44         | 0.00              | 6,140.44          |                                       | 9,029.96                 | 15,170.40                      | 13.00                         |
| Vacation            | Vacation                                                                     | 0.00             | 5,250.00          | 5,250.00          |                                       | 0.00                     | 5,250.00                       | 4.50                          |
| Training            | Training                                                                     | 10,000.00        | 2,500.00          | 12,500.00         |                                       | 0.00                     | 12,500.00                      | 10.71                         |
| Other Benefits      | Other Benefits                                                               | 0.00             | 1,080.00          | 1,080.00          |                                       | 0.00                     | 1,080.00                       | 0.93                          |
|                     | <b>Reward<br/>Summary<br/>Total</b>                                          | <b>96,676.68</b> | <b>8,830.00</b>   | <b>105,506.68</b> |                                       | <b>11,152.40</b>         | <b>116,659.08</b>              | <b>100.00</b>                 |

These benefits will make life better today as well as provide you with a more secure future.

Your employee benefits contribute greatly to your annual compensation and to your personal well being. This statement not only gives you a brief summary of your personal benefit elections, but also provides "cost of benefits" information, which is important when considering your total compensation.

We are constantly working to provide you with a benefits package that is competitive and progressive within our industry and community.

Sincerely,  
Doug Lewis

Resources

**Image: (Tablet) Total Rewards page**

This example shows the Total Rewards page (viewed by an employee), which is displayed on a tablet or medium form factor.

Employee Self Service
Total Rewards

Rosanna Channing
Senior Accounting Manager

Rewards Period
01 January 2016 - 31 December 2016
Printer View

Summary
Compensation
Allowances
Health
Life and Disability
Retirement
Vacation
Training
Other Benefits

Health

All amounts are shown in US Dollar currency.

► **View Summary Chart**

This section includes your health insurance and personal benefits during the statement period.

| Reward Item           | Employer Paid | Employer Provided | Employee Contribution |
|-----------------------|---------------|-------------------|-----------------------|
| Health Insurance      | 6,358.32      | 0.00              | 1,105.68 >            |
| Dental Insurance      | 48.00         | 0.00              | 202.56 >              |
| Vision Insurance      | 36.00         | 0.00              | 126.00 >              |
| Health Benefits Total | 6,442.32      | 0.00              | 1,434.24              |

**Health Benefits**

Health insurance is a vital part of making sure all employees and their families have access to quality medical care. We support a substantial proportion of the cost of such insurance. For more information on health insurance options, please consult:

- [Employee Handbook: Health and Wellness](#)

Additionally, you may wish to review the plans offered by our providers:

**Image: (Smartphone) Display of the left panel on the Total Rewards page when the page is loaded initially**

This example shows the initial display of the Total Rewards page (viewed by an employee), which is displayed on a smartphone or small form factor. The left panel is expanded for the user to select a specific page to view.

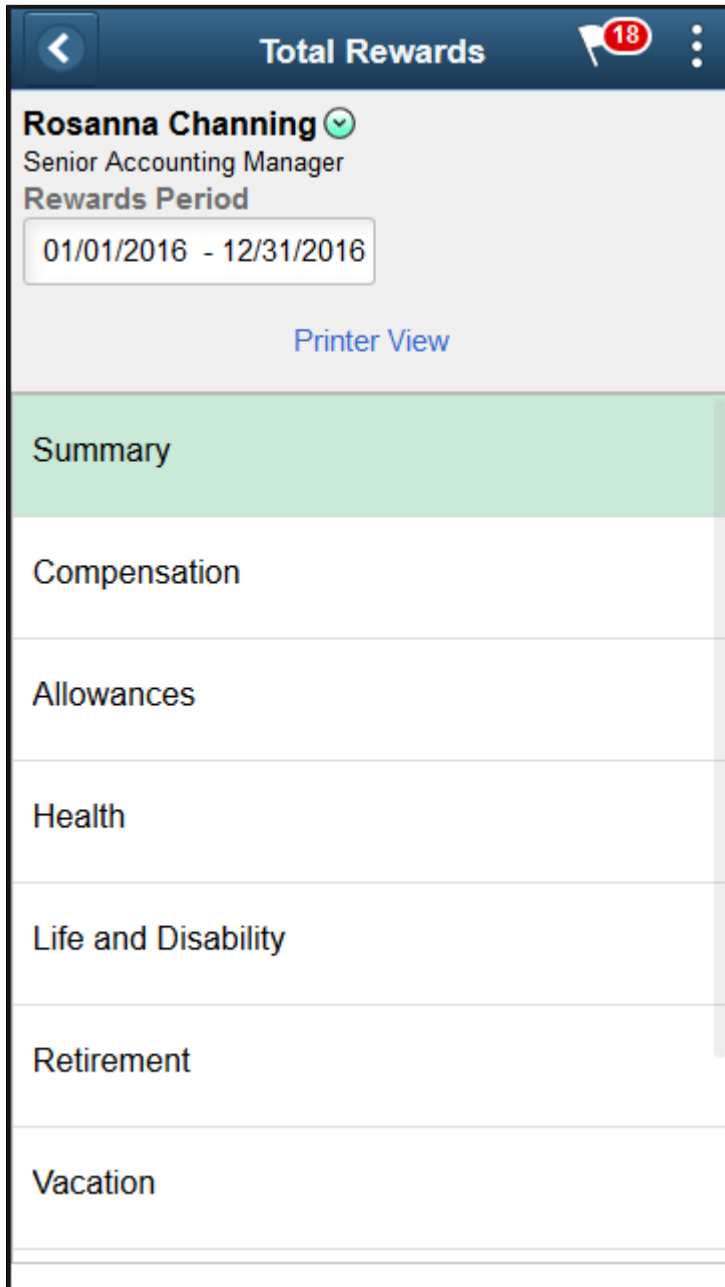


**Image: (Smartphone) Total Rewards page (Summary section) (1 of 3)**

This example shows the Total Rewards page (viewed by an employee), which is displayed on a smartphone or small form factor. On the Summary page, the summary chart is displayed by default (1 of 3).

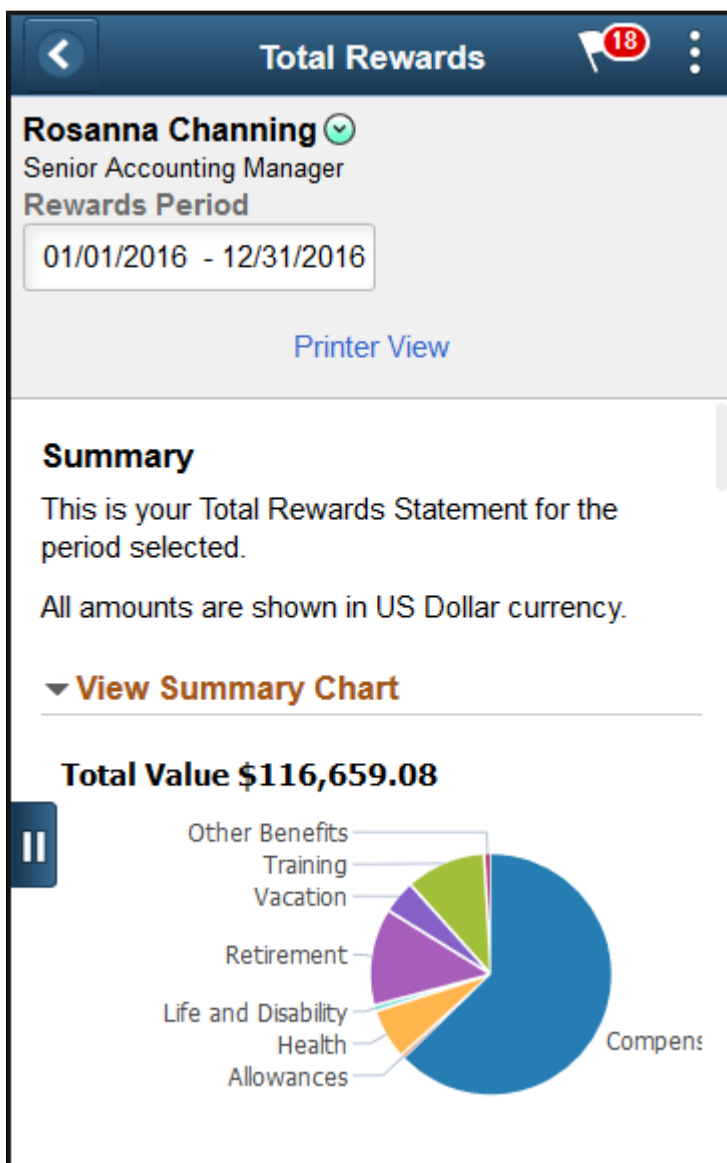


**Image: (Smartphone) Total Rewards page (Summary section) (2 of 3)**

This example shows the Total Rewards page (viewed by an employee), which is displayed on a smartphone or small form factor. On the Summary page, the section grid is also displayed by default (2 of 3).

**Total Rewards** 18

**Rosanna Channing** ✓  
Senior Accounting Manager  
**Rewards Period**  
01/01/2016 - 12/31/2016

[Printer View](#)

The following is a summary of all your Reward Items for the period selected.

| Compensation                   |           |
|--------------------------------|-----------|
| Employer Paid                  | 73,152.88 |
| Employer Provided              | 0.00      |
| Employer Total                 | 73,152.88 |
| Employer/Employee Contribution |           |
| Employee Contribution          | 0.00      |
| Employer/Employee Total        | 73,152.88 |
| Percent of Total Reward        | 62.71     |

| Allowances        |        |
|-------------------|--------|
| Employer Paid     | 720.00 |
| Employer Provided | 0.00   |
| Employer Total    | 720.00 |

**Image: (Smartphone) Total Rewards page (Summary section) (3 of 3)**

This example shows the Total Rewards page (viewed by an employee), which is displayed on a smartphone or small form factor. Formatted content, if configured in the associated template, appears beneath the section grid (3 of 3).

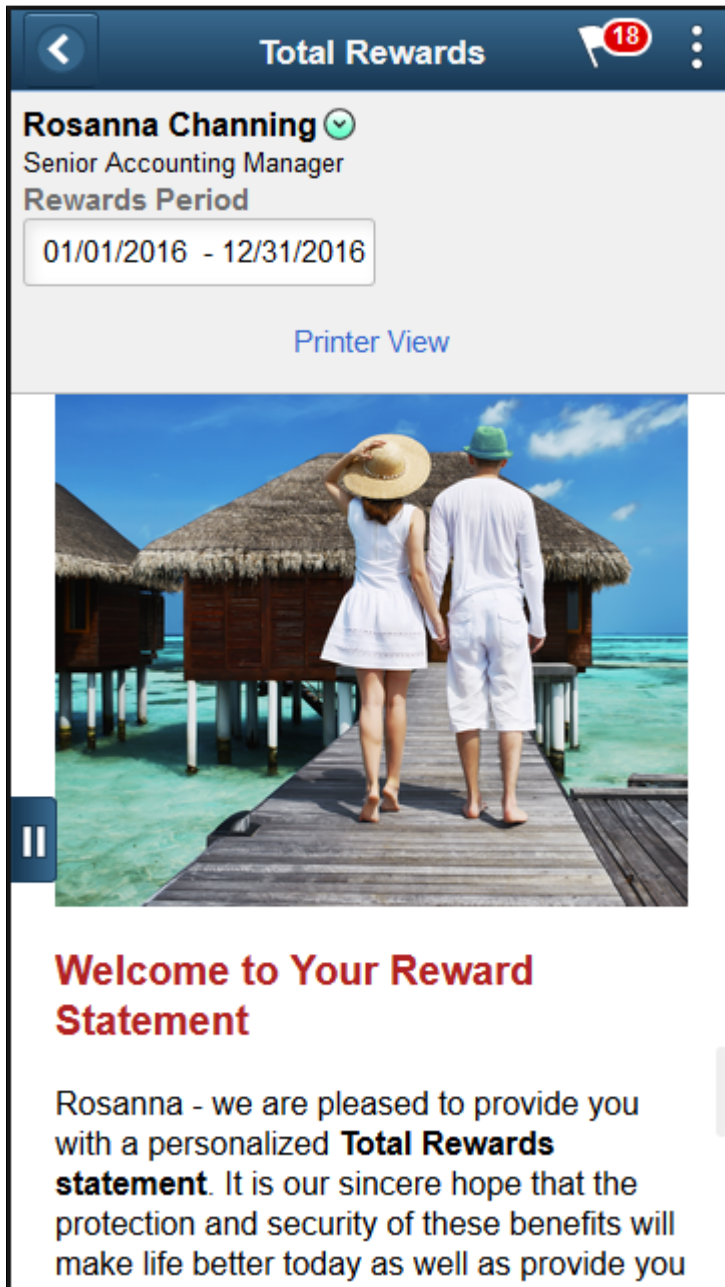


**Image: (Smartphone) Total Rewards page (non-Summary section)**

This example shows the Total Rewards page (viewed by an employee), which is displayed on a smartphone or small form factor. On a non-Summary page, the summary chart is hidden and the grid displayed by default.

**Total Rewards** 18

**Rosanna Channing** ✓  
Senior Accounting Manager  
**Rewards Period**  
01/01/2016 - 12/31/2016  
[Printer View](#)

**Life and Disability**  
All amounts are shown in US Dollar currency.

► **View Summary Chart**  
This section includes your life and disability insurance benefits during the statement period.

**Basic Life Insurance**

|                                |       |
|--------------------------------|-------|
| Employer Paid                  | 84.00 |
| Employer Provided              | 0.00  |
| Employer Total                 | 84.00 |
| <hr/>                          |       |
| Employer/Employee Contribution | >     |
| Employee Contribution          | 0.00  |
| Employer/Employee Total        | 84.00 |
| Percent of Total Reward        | 0.07  |

The presentation of total rewards statements is controlled by their associated templates.



[PeopleSoft Fluid Total Rewards](#)

## Header

This section displays the employee photo, employee name and job title if the statement is viewed by a manager. The employee name and job title are shown if it is viewed by the employee or an administrator. Role-specific related actions are available to managers and employees.

### Rewards Period

Select a statement of a particular period to view. By default, the most recent statement is displayed.

### Printer View

Click to launch a printer friendly version of the statement in a separate browser window or tab. Based on the template configuration, the printer version displays the statement's header information, summary chart, summary table and rich text content, followed by the reward item table and rich text content of all associated sections in a long page view.

---

**Note:** On the printer version of the statement, the display of the Employer-Employee Contribution widget column is replaced by the Employer Contribution Percent and Employee Contribution Percent columns, which show their respective percentage values in number. Additionally, both images and horizontal rules are not shown in the printer view of the statement.

---

## Left Panel

Templates control the availability and order of sections that are displayed on total rewards statements. This panel lists all total rewards page sections that are included in the associated template.

Click a section name for the system to load the corresponding section content in the main panel.



**Show Filter or Hide Filter**

Click to show or hide the sections on the left panel.

If the total rewards statement is loaded on a large or medium form factor, the left panel is displayed together with the main panel.

If the total rewards statement is loaded on a small form factor, only the left panel is displayed initially due to small screen size. Selecting a section on the left panel collapses the panel automatically, and displays the corresponding section content on the entire screen.

## Main Panel

This panel displays the content of the section that is selected on the left panel. Based on the setup of the associated template, section content includes statement introduction text, a summary chart, section information text, and a section grid.

The summary chart is available for viewing on all sections if enabled. The chart appears in the View Summary Chart area (expanded) on the Summary section by default. For non-summary sections, the chart is hidden in the collapsed View Summary Chart area by default. Hover over a sector of the chart to view the total amount of the corresponding reward (for example, Compensation, Health, and so on).

A section grid is displayed for each section of the statement, listing associated reward items and calculated amounts.

---

**Note:** Both the visibility of columns (except for the Reward Item column) in the section grid as well their column labels are entirely configurable through statement templates.

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The screenshots of the Total Rewards page (displayed in large form factor) shows all section columns.

|                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reward Item</b>                    | Click a reward item on a non-summary section (any row with a greater-than symbol on the right) to view all rows of data that are associated with that reward item total on the <a href="#">Reward Item Details Page</a> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Employer Paid</b>                  | Displays the employer paid contribution amount for the corresponding reward item.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Employer Provided</b>              | Displays the employer provided contribution amount for the corresponding reward item.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Employer Total</b>                 | Displays the sum of employer paid and employer provided amounts for the corresponding reward item.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Employer-Employee Contribution</b> | <p>Displays graphically the relative proportion of contributions made by the employer and employee for the corresponding reward item.</p> <p>Suppose that the <i>Health</i> reward item has these employer and employee contribution amounts:</p> <ul style="list-style-type: none"> <li>• Employer Paid: \$2,000</li> <li>• Employer Provided: \$0</li> <li>• Employee Paid: \$1,000</li> <li>• Employer and Employee Total: \$3,000</li> </ul> <p>The horizontal bar widget consists of the employer (left side) and employee (right side) portions, and is constructed using these formulas:</p> <p>Employer portion of the widget: <math>(\\$2,000 + \\$0) / \\$3,000 = 2/3</math></p> <p>Employee portion of the widget: <math>\\$1,000 / \\$3,000 = 1/3</math></p> <p>In this example, the employer portion fills two thirds of the total length of the widget, whereas the employee portion takes up the remaining one third of the total length.</p> <p>Hover over the widget to view the employer and employee contribution percentages, which are 66.67% and 33.33% respectively in this example.</p> |

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**Note:** In accessibility mode, this widget is replaced by two columns, Employer Contribution Percent and Employee Contribution Percent, with respective percent values.

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**Employee Contribution**

Displays the employee paid contribution amount for the corresponding reward item.

**Employer-Employee Total**

Displays the sum of employer paid, employer provided, and employee paid amounts for the corresponding reward item.

**Percent of Total Reward**

Displays the percentage number of the corresponding reward item amount against the overall total of all reward items.

Suppose that the *Training* reward item has these employer and employee contribution amounts:

- Employer Paid: \$2,000
- Employer Provided: \$1,000
- Employee Paid: \$500
- The total amount of all reward items: \$100,000

If the Include Employee Contributions in Totals option is disabled on the template definition, the formula for calculating the percent of total reward is:

$$\frac{[\text{Employer Paid}] + [\text{Employer Provided}]}{[\text{Total Amount of Reward Items}]}$$

$$(\$2,000 + \$1,000) / \$100,000 = 0.03$$

If the Include Employee Contributions in Totals option is enabled on the template definition, the formula for calculating the percent of total reward is:

$$\frac{[\text{Employer Paid}] + [\text{Employer Provided}] + [\text{Employee Paid}]}{[\text{Total Amount of Reward Items}]}$$

$$(\$2,000 + \$1,000 + \$500) / \$100,000 = 0.035$$

**Right Panel**

This panel displays the formatted message entered in the associated template. This message typically contains useful information and resources for users regarding the corresponding section.

If no message is available in the template, this panel is hidden.

For the small form factor with limited screen size, formatted content of the right panel appears beneath the section grid.

For other form factors, the right panel appears beneath the section grid dynamically, if the grid becomes too wide for all three panels to render side by side properly.

## Related Links

[Defining Total Reward Templates](#)

[Viewing and Printing the Total Rewards Statement](#)

## Reward Item Details Page

Use the Reward Item Details page (TRW\_STMT\_DTL\_SCF) to view the list of rows that roll up to the selected reward item total.

### Navigation

Click a reward item from a section grid on a non-Summary section.

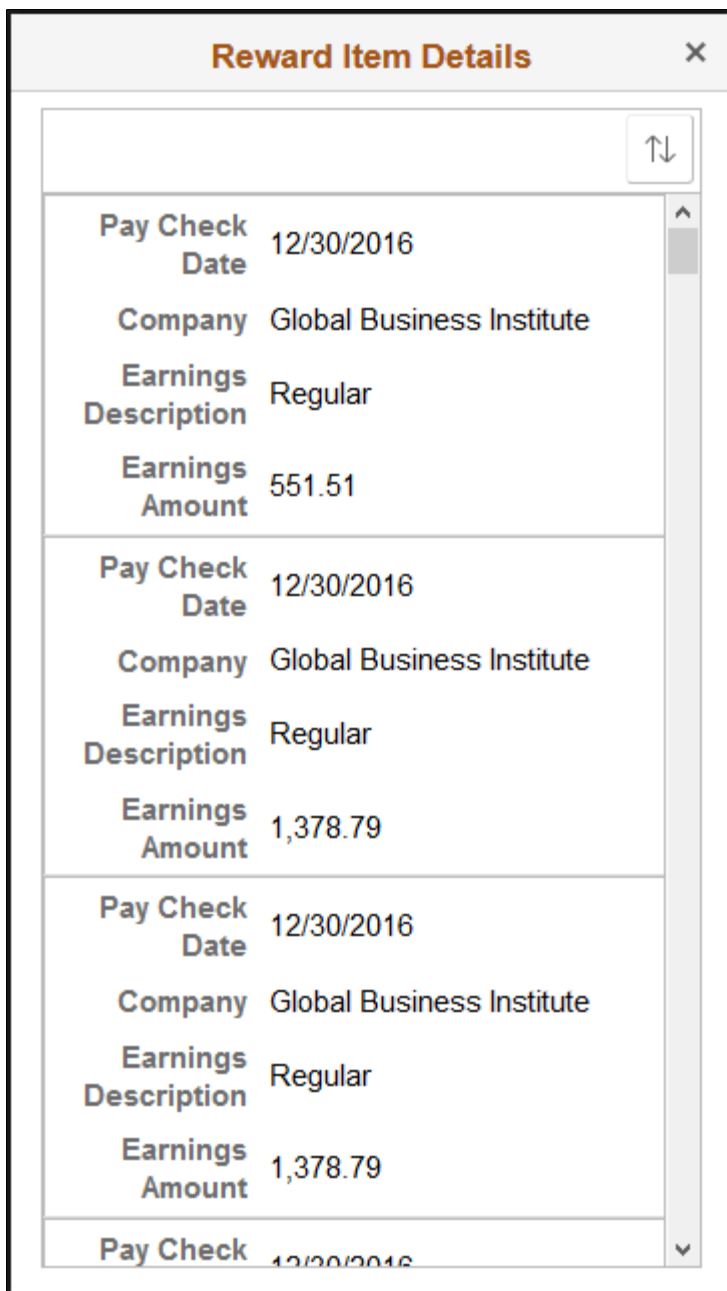
### Image: (Tablet) Reward Item Details page

This example illustrates the Reward Item Details page that is displayed in the tablet.

| Reward Item Details |                          |                       |               |               |
|---------------------|--------------------------|-----------------------|---------------|---------------|
| Health Insurance    |                          |                       |               |               |
| Pay Check Date      | Benefit Plan Description | Deduction Description | Employee Paid | Employer Paid |
| 12/30/2016          | Enhanced Medical Plan    | Medical Deductions    | 92.14         | 0.00          |
| 12/30/2016          | Enhanced Medical Plan    | Medical Deductions    | 0.00          | 529.86        |
| 11/30/2016          | Enhanced Medical Plan    | Medical Deductions    | 0.00          | 529.86        |
| 11/30/2016          | Enhanced Medical Plan    | Medical Deductions    | 92.14         | 0.00          |
| 10/31/2016          | Enhanced Medical Plan    | Medical Deductions    | 92.14         | 0.00          |
| 10/31/2016          | Enhanced Medical Plan    | Medical Deductions    | 0.00          | 529.86        |
| 09/30/2016          | Enhanced Medical Plan    | Medical Deductions    | 92.14         | 0.00          |

**Image: (Smartphone) Reward Item Details page**

This example illustrates the Reward Item Details page for the smartphone.



| Reward Item Details  |                           | ×  |
|----------------------|---------------------------|----|
| Pay Check Date       | 12/30/2016                | ↑↓ |
| Company              | Global Business Institute |    |
| Earnings Description | Regular                   |    |
| Earnings Amount      | 551.51                    | ^  |
| Pay Check Date       | 12/30/2016                |    |
| Company              | Global Business Institute |    |
| Earnings Description | Regular                   | v  |
| Earnings Amount      | 1,378.79                  |    |
| Pay Check Date       | 12/30/2016                |    |
| Company              | Global Business Institute |    |
| Earnings Description | Regular                   |    |
| Earnings Amount      | 1,378.79                  |    |
| Pay Check Date       | 12/30/2016                |    |

This page lists the details of all data rows that roll up to the selected reward item total. Each reward item displays different field outputs, as configured on the [Define Reward Item Page](#).

