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PeopleSoft

PeopleSoft HCM 9.2: PeopleSoft eCompensation

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PeopleSoft HCM 9.2: PeopleSoft eCompensation
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Preface

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 PeopleSoft Online Help

If you're setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, 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

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- 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.

Typographical Convention	***Description***
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. Ampersands also precede all PeopleCode variables.

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Typographical Convention	*Description*
⇒	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)

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- 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.

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.

PeopleSoft HCM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

HCM Abbreviations

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

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Chapter 1

Getting Started with eCompensation

eCompensation Overview

eCompensation comprises self-service transactions that interface with the PeopleSoft HCM system.

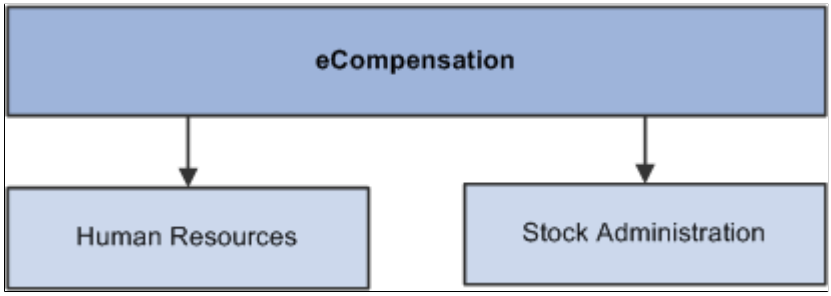
Workers can:

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

eCompensation Integrations

eCompensation integrates with the following PeopleSoft applications.

This diagram illustrates the PeopleSoft products that eCompensation integrates with, which includes Human Resources and Stock Administration.



eCompensation Implementation

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

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.

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Chapter 2

Viewing Compensation History

Viewing Compensation History

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

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

Pages Used to View Compensation History

Page Name	*Definition Name*	*Usage*
“Compensation History Page (Classic Employee View)” (PeopleSoft eCompensation Manager Desktop)	HR_ECOMP_EE_HIST	View compensation history as an employee.
“Award Details Page” (PeopleSoft eCompensation Manager Desktop)	HR_ECOMP_VC_SEC	View details of a compensation change.

Understanding the Pages Used to View Compensation History

Workers use the Compensation History transaction to view their own compensation histories. The Compensation History page displays various types of compensation changes that were applied to the worker, including base salary, variable cash, variable non-cash and stock option.

Workers can:

- Click a date link to view additional information about the corresponding compensation change in a modal window.
- Access the chart to view the compensation data (base salary, stock option, and variable cash) in a graphical format.

Note: The functionality and appearance of the page are almost the same for managers (viewing data of their employees) and employees (viewing their own data), except that the employee view of the compensation history chart includes the Job filter if the employee has multiple jobs. In addition, employee photo, job title, and the related actions list are not visible on the Compensation History page in the employee view.

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Conditional Navigation for Compensation History

When workers access their own compensation history through the menu navigation, they are taken to either the fluid or classic version of the component depending on the presence of a user role. This behavior is known as conditional navigation.

If workers are members of the *Compensation Employee Fluid* user role, they are given access to the "Compensation History Page (Fluid Employee View)" (PeopleSoft eCompensation Manager Desktop). Workers without this role view component history using the "Compensation History Page (Classic Employee View)" (PeopleSoft eCompensation Manager Desktop).

Related Links

"(Classic) Reviewing Employee Compensation" (PeopleSoft eCompensation Manager Desktop)

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Chapter 3

(FRA) Profit-Sharing Self-Service Transactions

Understanding the Profit-Sharing Self-Service Transactions

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

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

- Agreement Personalization (HR_SS_WP_AGREEMENT)

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

- Profit-Sharing Entitlements (HR_SS_WP_PROFIT_SH)

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

Note: Worker options are also provided with the Manage Profit Sharing business process in PeopleSoft HCM.

Pages Used by the Profit-Sharing Self-Service Transactions

Page Name	*Definition Name*	*Usage*
Agreement Information Page	HR_SS_WP_AGRT_DTL	View details of the agreements for which they are eligible. This includes the agreement type, agreement start and end date, agreement duration, investment methods, and computed global fund. Workers can also view the agreement document from this page.
Investment Details Page	HR_SS_WP_AGRT_INV	Display information about the investment method. The fields displayed vary according to the investment method.
View Formula Page	HR_SS_WP_AGRT_FML	View the funding formula associated with the agreement.

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

Related Links

"Viewing Personal Entitlements and Requesting Fund Release" (PeopleSoft Human Resources Manage French Profit Sharing)

Prerequisites

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

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

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

Agreement Information Page

Use the Agreement Information page (HR_SS_WP_AGRT_DTL) to view details of the agreements for which they are eligible.

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This includes the agreement type, agreement start and end date, agreement duration, investment methods, and computed global fund. Workers can also view the agreement document from this page.

Navigation:

Self Service > **Payroll and Compensation** > **Agreement Personalization** > **Agreement Information**

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

Proposed Investments

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

Field or Control	*Description*
Investment	Lists the investment methods in the agreement definition. Click an investment method to view its details. The information shown varies, depending on the investment method.
Favorite Investment	Indicates the default investment method. This is how a worker's funds are invested, unless the worker selects another investment method.

Computed Global Fund

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

Field or Control	*Description*
From Date and **Thru Date** (through date)	The start and end dates of the reference period.
Global Fund Amount	Displays the total global fund. This amount is calculated by the Compute Global Fund process, using the formulas defined on the Define Agreement - Computation page.
View Formula	Click to view the formula that was used to calculate the global fund. The system displays the formula comments entered on the Formula Comments page.

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Field or Control	*Description*
Personalize Agreement	Click to access the Personalize Agreement Options page, where workers can select the following for each reference period of the agreement: • The investment method. • How interest is paid (for profit-sharing agreements with *Company Investment* as the investment method). Workers can't change this information after the personalization date defined for the reference period. If a worker receives a payment or a transfer is completed before the personalization deadline, the system doesn't allow them to update the agreement settings after this payment or transfer date. If a personalization date is not defined, a worker can't personalize an agreement if the reference period status is approved.
View Agreement Legal Document	Click to display the agreement document.

Personalize Agreement Options Page

Use the Personalize Agreement Options page (HR_SS_WP_AGRT_PRS) to select an investment method for their funds.

For profit-sharing agreements with Company Investment as the investment method, workers can also select whether to receive yearly interest payments or reinvest them in the fund.

Navigation:

Click the **Personalize Agreement** link on the Agreement Information page.

Personalize Interest Option

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

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Field or Control	*Description*
Interest To Be Paid	The system displays the default method for handling interest payments, as defined in the agreement. Workers can override the default option for each reference period. Options are: *Immediate:* To receive interest payments once a year. *Re-Invest:* To reinvest interest payments in the worker's profit-sharing fund. The interest is added to the worker's individual fund, which generates further interest the next year.

Personalize Investment Option

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

Field or Control	*Description*
Investment	If multiple investment methods are defined for an agreement, workers can select the investment method for their fund. Workers can select only from the methods defined for the agreement on the Investment page. Workers who are leaving the organization select *Transfer to new comp/fin orga.* to identify the organization to which the funds are transferred.

Profit-Sharing Page

Use the Profit-Sharing page (HR_SS_WP_PROF_DTL) to view details of their profit-sharing entitlement, including gross and net amounts, payment status, and information about the average profit-sharing amounts.

Navigation:

Self Service > **Payroll and Compensation** > **Profit-Sharing Entitlements** > **Profit-Sharing**

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

See “Viewing Personal Entitlements and Requesting Fund Release” (PeopleSoft Human Resources Manage French Profit Sharing).

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

Submit Fund Release Request Page

Use the Submit Fund Release Request page (HR_SS_WP_PROF_REQ) to request release of profit sharing amount.

This page is only available if workers are associated with profit-sharing agreements that have Company Investment selected as the investment method.

Navigation:

Click the **Release Request** button on the Profit Sharing page.

Submitted Requests

Displays details of requests previously submitted by the worker.

New Request

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

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

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

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

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

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

See “Viewing Personal Entitlements and Requesting Fund Release” (PeopleSoft Human Resources Manage French Profit Sharing).

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