

# PeopleSoft HCM 9.2: PeopleSoft Human Resources Manage French Profit Sharing

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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 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

- 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>Typographical Convention</b>	<b>Description</b>
<b>Key+Key</b>	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 <b>Alt+W</b> , hold down the <b>Alt</b> key while you press the <b>W</b> 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.

<b>Typographical Convention</b>	<b>Description</b>
⇒	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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## 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” (Application Fundamentals)

[PeopleSoft Spotlight Series](#)

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Send your suggestions to [psoft-infodev\\_us@oracle.com](mailto: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 Manage French Profit Sharing

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## Manage French Profit Sharing Overview

The Manage French Profit Sharing business process in Human Resources (HR) provides French customers with the ability to manage their profit-sharing and worker's participation agreements.

You can set up profit-sharing agreements and run processes that automate the calculation of funds and employees' personal funds. The Manage French Profit Sharing business process includes employee options for viewing agreements and fund details. You can also give employees the ability to update their investments and request fund releases.

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## Manage French Profit Sharing Business Processes

Manage French Profit Sharing provides these business processes:

- Agreement and reference period definition.
- Eligibility processing.
- Calculating profit sharing.
- Interest and payment processing.
- Administering profit sharing.
- Profit sharing for employees.

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

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## Manage French Profit Sharing Integrations

The Manage French Profit Sharing business process integrates with PeopleSoft Global Payroll for France.

We discuss integration considerations in the implementation topic in this product documentation.

### Related Links

[Understanding Profit-Sharing Agreements](#)

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## Manage French Profit Sharing Implementation

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

### 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, and business process maps.

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID [2342162.1](#)) article on My Oracle Support 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 Also *PeopleTools: Setup Manager* and *PeopleTools: Component Interfaces*

### Related Links

Application Fundamentals

## Chapter 2

# Understanding Manage French Profit Sharing

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## Manage French Profit Sharing

The Manage French Profit Sharing business process in HR is for French customers who need to manage their profit-sharing and worker's participation agreements. Here is a summary of the features of this business process:

- Ability to define agreements and link the agreement document, giving online access to agreement definitions.
- Automatic calculation of global funds and each employee's personal fund.
- Compensation administrators can review and adjust the results of the calculation at every stage and approve fund release and track fund transfer.
- Online access for employees to view agreement and fund information.  
Employees can also update their investment settings and request release of funds.
- Integrating HR with Global Payroll for France enables you to automatically process payments for profit-sharing and worker's participation funds.
- Integration points enable you to integrate other payroll systems with Manage French Profit Sharing.
- Workflow provides automatic notification of profit sharing events for employees and compensation administrators.
- Reports provide details of employees' profit-sharing funds.

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## Manage French Profit Sharing Business Processes

Manage French Profit Sharing supports the following business processes:

- Agreement definition.

The Manage French Profit Sharing business process supports two types of agreements, profit-sharing agreements and worker's participation agreements. You define all the rules relating to the agreement, including eligibility criteria, calculations for computing the global fund and sharing it between employees, and the investment methods available. Calculations are based on company results and payroll information over a period known as a reference period. You create one or more reference periods for each agreement, depending on the duration of the agreement.

- Eligibility processing.

The Extract Eligible Employees Application Engine process (HR\_WP\_ELIGIB) identifies the employees who qualify for profit sharing under the terms of an agreement and imports payroll information for all eligible employees from Global Payroll for France, or from a record that you have populated from another payroll system.

- Calculating and distributing profit sharing.

PeopleSoft provides two processes, Compute Global Fund Application Engine process (HR\_WP\_GBLFND) and Distribute Global Funds Application Engine process (HR\_WP\_SHARE), that calculate the global funds and each employees' personal entitlement. These processes calculate the global funds available using formulas defined in the agreement, and divide funds according to the distribution rules in the agreement. PeopleSoft deliver legal formulas for calculating funds, where these are defined by French legislation.

- Payment and Interest processing.

Earnings from profit sharing are liable for deductions. The Payment and Interest process automatically calculates employees' deductions. For those employees who receive interest on profit sharing funds, the system also calculates the interest amount and the deductions for the interest payment. If you have integrated HR with Global Payroll for France or another payroll system, you can process employee payments for worker's participation agreements and profit-sharing agreements where the investment is managed internally.

- Administering and reporting profit sharing.

The Manage French Profit Sharing business process provides administration options for reviewing employees' profit sharing details, and adjusting the results of the automated processes, if required. Compensation administrators approve employee requests for fund release and can track fund transfers using the Member Entitlement component.

- Profit sharing for employees.

Employees have access to their profit sharing information online by using HR. The Manage French Profit Sharing business process provides employee options for viewing details of approved agreements and personalizing agreement settings, and viewing personal entitlements. In addition, employees who are entitled to funds from a profit-sharing agreement can submit requests for fund releases.

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## Manage French Profit Sharing Terms

This section discusses common terms that are used in the Manage French Profit Sharing business process.

## Common Terms Used in Manage Profit Sharing

<b>Field or Control</b>	<b>Description</b>
<b>Agreement</b> (accord)	Defines the terms of the profit-sharing or worker's participation scheme. Several organizations, including staff representative bodies, are involved in approving agreements. Employees can view agreement definitions once an agreement is approved by all the relevant organizations.
<b>Agreement group</b>	Defines the companies and establishments that share the same agreement.
<b>Profit-sharing agreement</b> (accord de participation aux résultats)	A type of agreement. The global fund for this type of agreement is dependent on company profits.
<b>Worker's participation agreement</b> (accord d'intéressement des salariés)	A type of agreement. The global fund for this type of agreement is dependent on achieving objectives that are defined in the agreement.
<b>Global fund</b> (réserve)	The amount that is shared between eligible employees. The global fund is calculated after the end of the reference period.
<b>Distribution method</b> (mode de répartition)	<p>Defines how the global fund is shared between employees. The Manage French Profit Sharing business process supports these distribution methods:</p> <ul style="list-style-type: none"> <li>• Uniform distribution divides the fund equally between eligible employees.</li> <li>• Prorate with salary is based on employees' salaries.</li> <li>• Prorate with working duration is based on the number of days that the employee worked in the reference period.</li> <li>• Any combination of the above distribution methods.</li> </ul>
<b>Investment method</b> (méthode d'investissement)	Defines how the global fund is invested. Investment methods vary according to the agreement type. Each agreement definition includes one or more investment methods. Employees can accept the default investment method defined for the agreement or select from the specified methods.

<b>Field or Control</b>	<b>Description</b>
<b>Reference period</b> (période de référence)	<p>Defines the period that the profit sharing calculations are based on. An agreement is valid for one or more reference periods. The profit sharing processes use company and establishment financial data and employee payroll data for a reference period to:</p> <ul style="list-style-type: none"> <li>• Determine which employees are eligible for a share of the global fund.</li> <li>• Calculate the global fund.</li> <li>• Calculate employees' profit-sharing amount.</li> </ul>
<b>Unavailability period</b> (période d'indisponibilité)	<p>The period during which global funds are not available to employees. Profit-sharing agreements have a fixed period at the end of the reference period when employees cannot access, except in certain situations, their share of the global fund. Worker's participation agreements don't have an unavailability period; funds are available as soon as the compensation administrator runs the profit sharing processes and approves the results.</p>

# Setting Up Profit Sharing

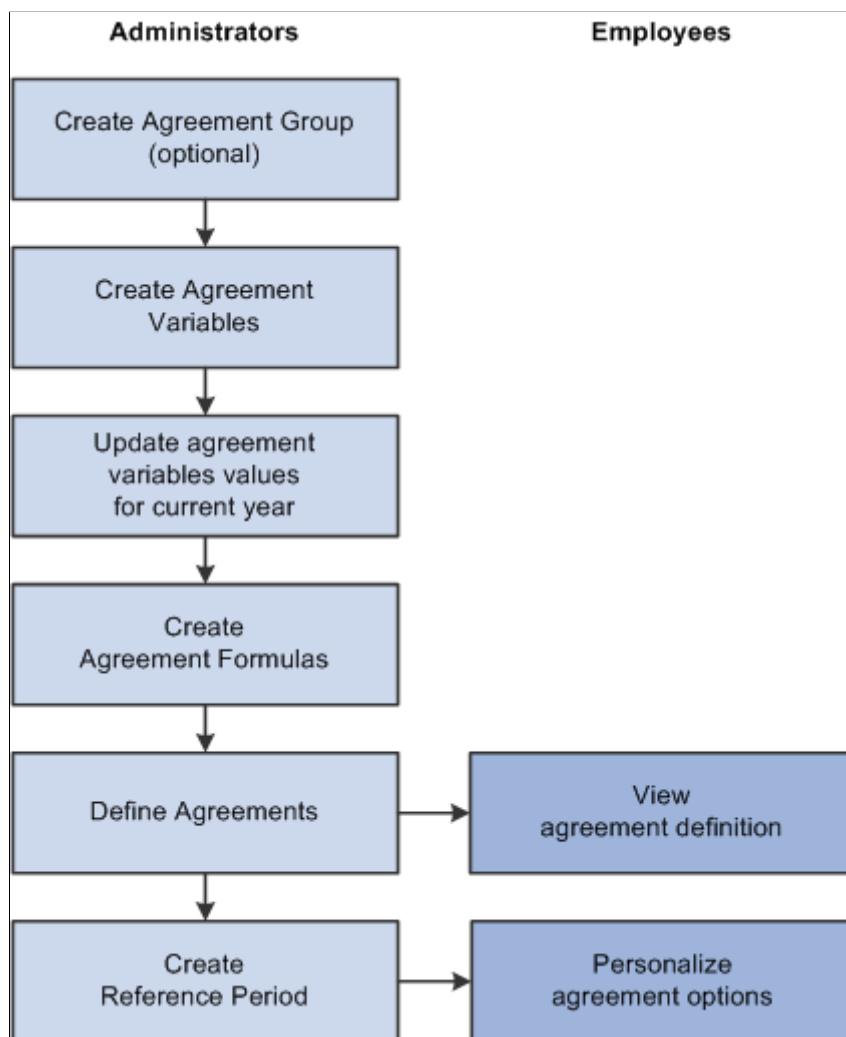
## Understanding Profit-Sharing Agreements

The first step in the profit-sharing business process is to define your organization's agreements. You can manage two types of agreement, each with different rules:

- Worker's participation agreements (intéressement des salariés).
- Profit-sharing agreements (participation aux résultats).

You can create both agreement types using the same Define Agreement (WP\_AGREEMENT) component. This diagram shows the steps in creating an agreement:

Agreement setup process flow



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**Note:** Each step is covered in detail in this product documentation.

---

## Defining Agreement Groups

To define agreement groups, use the Agreement Group component (WP AGREEMENT GROUP). This section discusses how to define agreement groups.

Agreements can apply to a single company or a group of companies and establishments.

### Page Used to Define Agreement Groups

<b><i>Page Name</i></b>	<b><i>Definition Name</i></b>	<b><i>Usage</i></b>
Agreement Group Page	WP_AGRT_GRP_TBL	Define agreement groups, the companies and establishments that share the same profit-sharing agreement.

### Agreement Group Page

Use the Agreement Group page (WP\_AGRT\_GRP\_TBL) to define agreement groups, the companies and establishments that share the same profit-sharing agreement.

Navigation:

**Set Up HCM > Product Related > Compensation > Profit Sharing FRA > Agreement Group > Agreement Group**

This example illustrates the fields and controls on the Agreement Group page. You can find definitions for the fields and controls later on this page.

### Agreement Group

Agreement Group ID KFG001

\*Long Description Group for Establishment KF001

Short Description KFG001

Include Company		Personalize   Find   View All         First  1 of 1  Last
*Company	KF1 	Business Institute - France  

Include Establishment		Personalize   Find   View All         First  1 of 1  Last
*Establishment ID	KF001 	Paris - Headquarter  

Exclude Establishment		Personalize   Find   View All         First  1 of 1  Last
*Establishment ID	KF002 	Bordeaux - Le Banville  

### Include Company

<b>Field or Control</b>	<b>Description</b>
Company	Select the companies that belong to the agreement group.

### Include Establishment

<b>Field or Control</b>	<b>Description</b>
Establishment ID	Select establishments to include in the agreement group. Use this field to select individual establishments associated with companies that are not listed in the <b>Include Company</b> group box.

## Exclude Establishment

<b>Field or Control</b>	<b>Description</b>
<b>Establishment ID</b>	If the agreement group doesn't include all the establishments in the selected companies, select the establishments to exclude from the group.

---

## Setting Up Variables and Formulas

To set up formulas, use the Agreement Variables component (WP\_VARIABLE) and the Agreement Formulas component (WP\_FORMULA). This section provides overviews of formulas and variables required for profit sharing and discusses how to define variables for profit-sharing formulas and Set up formulas.

### Pages Used to Set Up Variables and Formulas

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Agreement Variables Page</a>	WP_VARIABLE_TBL	Define variables for use in the profit-sharing formulas.
<a href="#">Agreement Formulas Page</a>	WP_FORMULA_TBL	Define formulas for profit-sharing calculations.
Formula View Page	WP_FORMULA_VW_SEC	View a plain text version of the formula. Click the <b>View Formula</b> link on the Agreement Formulas page.
Formula Comments Page	WP_FORMULA_CMT_SEC	Enter comments about the selected formula. Click the <b>Comments</b> link on the Agreement Formulas page.

## Understanding Formulas

Profit-sharing processes use formulas that you specify in the agreement to calculate the global fund amount and employees' individual funds. To offer flexibility in defining calculations, formulas vary from simple formulas in which you assign a variable to the formula to more complex situations in which you take values from fields in the database to use in the calculation.

When you create an agreement, define formulas that calculate the following values:

- Global fund.

PeopleSoft provides the legal formula for profit sharing agreement types; worker's participation agreements don't have a legal formula.

- Global fund limit.

This is an optional formula that defines the maximum or minimum global fund amount. PeopleSoft delivers formulas to calculate this amount for profit-sharing and worker's participation agreements.

- Individual salary limit.

This optional formula is used in the distribution calculation where the global fund amount is shared according to employees' salaries. The formula defines the maximum salary amount used in this calculation.

- Individual allocation limit.

This optional formula defines the maximum amount received by any employee.

If a formula references variables with a type of *Monetary*, the formula is assigned the same currency code. However, when the system resolves a formula, all amounts are converted to the currency specified in the agreement definition. All profit-sharing pages and reports use this currency.

## Understanding Variables

Variables store monetary and other numeric values that are used in the profit-sharing formulas. Use variables to:

- Provide one of the values used in a formula.
- Assign a value to the formula directly.

For some agreements, a formula may be calculated outside the system and the final result entered into the system. To do this, define the variable and assign it to the relevant formula. For each reference period, update the variable with the calculated value before running the calculation processes.

You must define variables, using the Agreement Variables page, before you can use them in formulas.

---

**Note:** You must assign values to variables before you run the processes for a new reference period.

---

## Agreement Variables Page

Use the Agreement Variables page (WP\_VARIABLE\_TBL) to define variables for use in the profit-sharing formulas.

Navigation:

**Set Up HCM > Product Related > Compensation > Profit Sharing FRA > Agreement Variables > Agreement Variables**

This example illustrates the fields and controls on the Agreement Variables page. You can find definitions for the fields and controls later on this page.

**Agreement Variables**

Variable ID KFSSLIMIT

\*Long Description Social Security contribution limit (annual)

Short Description SSLimit

Variable Values							Personalize	Find	View All	First	1 of 1	Last
*Value Scope	*Effective Date	*Status	*Type	Monetary Value	Currency	Prorate						
Global	01/01/2002	Active	Monetary	28,224.00	EUR							

<b>Field or Control</b>	<b>Description</b>
<b>Variable ID</b>	<p>Identifies the variable. PeopleSoft delivers the following variables that are used in the statutory formulas:</p> <p><i>KFBC</i>: Account Net Income (bénéfice net comptable).</p> <p><i>KFBF</i>: Fiscal Net Income (bénéfice net fiscal). Refer to French legal report 2058-A line XN.</p> <p><i>KFC</i>: Capital (capitaux propres) as defined by French labor laws (code du travail).</p> <p><i>KFCAN</i>: Revenue for current reference period. This is optional and is used for profit-sharing agreements only.</p> <p><i>KFCAN-1</i>: Revenue for the previous reference period. This is optional and is used for profit-sharing agreements only.</p> <p><i>KFCRDS</i>: Rate for CRDS (contribution au remboursement de la dette sociale) contributions. PeopleSoft delivers the values for this variable as system data.</p> <p><i>KFCSG</i>: Rate for CSG (contribution sociale généralisée) contributions. PeopleSoft delivers the values for this variable as system data.</p> <p><i>KFIMMED</i>: Limit for immediate payment of funds. This is for profit-sharing agreements only. When an employee's profit-sharing amount is below this limit, the employee is entitled to receive the amount immediately. PeopleSoft delivers the values for this variable as system data.</p> <p><i>KFMS</i>: Total Payroll (masse salariale). This variable is used for worker's participation agreements only. It is used by the formula KF20PCTMS to determine whether the global fund is more than 20 percent of the total salaries. The Distribute Global Funds process also uses the variable to determine the total salary to use for distributing funds based on salary.</p> <hr/> <p><b>Note:</b> If you want the global fund limit formula (KF20PCTMS) and the Distribute Global Funds process to be based on different totals, define the <i>KFMS</i> variable for the process and create a new global fund limit formula for your worker's participation agreement which doesn't reference the <i>KFMS</i> variable.</p> <hr/> <p><i>KFS</i>: Total of salaries used in the legal profit sharing global fund formula.</p> <p><i>KFSOC</i>: Social Contribution of 2 percent paid on interest payments. PeopleSoft delivers the values for this variable as system data.</p> <p><i>KFSSLIMIT</i>: Social Security contribution limit used in limit formulas such as the Individual Allocation Limit formula. PeopleSoft delivers the values for this variable as system data.</p> <p><i>KFVA</i>: Added Value (valeur ajoutée) as defined by French labor laws.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Value Scope and Scope Reference</b>	<p>Defines the scope of the variable. You can define a variable with more than one scope if you want to use the same variable name but assign it different values depending on the scope. Values include:</p> <p><i>Global</i>: The variable applies to all employees and all agreements. An example of a global variable is the Social Security contribution limit variable, which varies over time but is the same for all employees. The <b>Scope Reference</b> field is not displayed for global variables.</p> <p><i>Company</i>: The variable applies to a specific company. For example, the value of the Net Income variable is different for each company. Select the company in the <b>Scope Reference</b> field.</p> <p><i>Agreement Group</i>: The variable applies to all companies or establishments within an agreement group. Select the agreement group in the <b>Scope Reference</b> field.</p> <p><i>Establishment</i>: The variable applies to an establishment that you select in the <b>Scope Reference</b> field.</p> <p><i>Work Unit</i>: The variable applies to a work unit that you select in the <b>Scope Reference</b> field. Work units are created using the group build feature.</p> <p>When the system processes a formula, it looks for the variable that is appropriate for the agreement. It's important that you define the scope correctly. Otherwise, the system may not find the variable or may retrieve the wrong value.</p> <p>For example, if you set up a profit-sharing agreement for an agreement group, the system searches for a variable with a scope of <i>Agreement Group</i> and if it doesn't find one, it looks for a variable with a scope of <i>Global</i>. If you define the variable scope as <i>Company</i>, the system does not find the variable.</p> <p>For worker's participation agreements you can define calculations at the agreement level, establishment level, or work unit level. For such formulas, the system searches for a variable defined for that establishment or work unit, and if it doesn't find one, it looks for a global variable of the same name.</p> <p>See <a href="#">Computation Page</a>.</p>
<b>Type</b>	<p>Select <i>Monetary</i> or <i>Numeric</i>. If you select <i>Monetary</i>, select the corresponding <b>Currency</b>.</p>
<b>Prorate</b>	<p>Select if the variable is prorated for reference periods of less than a year. For example, if a variable stores an annual limit, but you have set up a reference period of 3 months, select this check box to use a prorated value in the calculations.</p>

## Related Links

“Understanding Group Build” (Application Fundamentals)

[Understanding the Distribute Global Funds Application Engine Process \(HR\\_WP\\_SHARE\)](#)

## Agreement Formulas Page

Use the Agreement Formulas page (WP\_FORMULA\_TBL) to define formulas for profit-sharing calculations.

Navigation:

**Set Up HCM > Product Related > Compensation > Profit Sharing FRA > Agreement Formulas > Agreement Formulas**

This example illustrates the fields and controls on the Agreement Formulas page. You can find definitions for the fields and controls later on this page.

**Agreement Formulas**

Formula ID: LEGAL\_RSP

Formula Criteria		Find	View All	First	1 of 1	Last
*Effective Date	01/01/1990	<input style="width: 20px; height: 20px; border: none;" type="button" value="..."/>	*Status	Active	<input style="width: 20px; height: 20px; border: none;" type="button" value="+"/>	<input style="width: 20px; height: 20px; border: none;" type="button" value="-"/>
*Long Description: Legal Funding Formula						
Short Description: Legal Fund		View Formula		Comments		
Formula Details		Personalize	Find	View All	First 1-7 of 17 Last	
Sequence	*Operand	Variable	Value/Record			
1	Constant		0.500000 <input style="width: 20px; height: 20px; border: none;" type="button" value="+"/> <input style="width: 20px; height: 20px; border: none;" type="button" value="-"/>			
2	*		<input style="width: 20px; height: 20px; border: none;" type="button" value="+"/> <input style="width: 20px; height: 20px; border: none;" type="button" value="-"/>			
3	(		<input style="width: 20px; height: 20px; border: none;" type="button" value="+"/> <input style="width: 20px; height: 20px; border: none;" type="button" value="-"/>			
4	Variable	KFBF <input style="width: 20px; height: 20px; border: none;" type="button" value="..."/>	<input style="width: 20px; height: 20px; border: none;" type="button" value="+"/> <input style="width: 20px; height: 20px; border: none;" type="button" value="-"/>			
5	-		<input style="width: 20px; height: 20px; border: none;" type="button" value="+"/> <input style="width: 20px; height: 20px; border: none;" type="button" value="-"/>			
6	(		<input style="width: 20px; height: 20px; border: none;" type="button" value="+"/> <input style="width: 20px; height: 20px; border: none;" type="button" value="-"/>			
7	Constant		5.000000 <input style="width: 20px; height: 20px; border: none;" type="button" value="+"/> <input style="width: 20px; height: 20px; border: none;" type="button" value="-"/>			

<b>Field or Control</b>	<b>Description</b>
<b>Formula ID</b>	<p>Identifies the formula. PeopleSoft delivers statutory formulas for the Manage French Profit Sharing business process, and technical formulas that are called by the processes. Here is a list of the statutory formulas:</p> <p><i>LEGAL_RSP</i>: Legal funding formula that calculates the global fund for profit-sharing agreements.</p> <p><i>LEGAL_MAX1</i>, <i>LEGAL_MAX2</i>, <i>LEGAL_MAX3</i>, and <i>LEGAL_MAX4</i>: Global fund limit formulas for profit-sharing agreements.</p> <p><i>KF20PCTMS</i>: Global fund limit formula for worker's participation agreements. This formula uses the KFMS variable to check that the global fund is not more than 20 percent of total payroll.</p> <p><i>1/2SSLIMIT</i>: Individual allocation fund formula that is equivalent to half the annual social security ceiling.</p> <p><i>3/4SSLIMIT</i>: Individual allocation fund formula that is equivalent to three quarters of the annual social security ceiling.</p> <p><i>4SSLIMIT</i>: Individual salary limit formula that is equivalent to four times the annual social security ceiling.</p> <p><b>Note:</b> Other delivered formulas are technical and called from the profit sharing processes.</p>
<b>Operand</b>	<p>Select an operand and click the <b>Refresh</b> button. The Operand that you select determines the other fields that are hidden or displayed on the page. Values include:</p> <p><i>Constant</i>: Represents a fixed value. Enter a percentage or other fixed amount in the <b>Value/Record</b> field.</p> <p><i>Rate Code</i>: Refers to a Rate Code that you specify from the Rate Code table. Select a rate code in the <b>Rate Code</b> field.</p> <p><i>Rec. Field (Record, Field Name)</i>: Refers to a field you specify from a record. Select the record and field in the <b>Record</b>, <b>Field Name</b> field. You can select from the following records: <i>EMPLOYMENT</i>, <i>JOB</i>, <i>PERS_DATA_EFFDT</i>, or <i>SAL_GRADE_TBL</i>.</p> <p><i>Variable</i>: Refers to a variable that you specify. In the <b>Variable</b> field, select from the variables that you defined on the Agreement Variables page. For some agreements, a formula may be calculated outside the system and the final result entered into the system. To do this, define the variable and assign it to the relevant formula.</p>
<b>View Formula</b>	Click to view a plain text version of the formula.

<b>Field or Control</b>	<b>Description</b>
<b>Comments</b>	Click to access the Formula Comments page where you can enter comments about the formula. When employees view the global fund formula the system displays the text you enter on the Formula Comments page. Therefore you should enter comments that help employees understand the global fund calculation. See the comments delivered with the LEGAL_RSP formula for an example of how to use the Formula Comments page.
<b>Save</b>	Click to save the formula. The system checks the syntax and displays an error message if there are missing fields or brackets.

## Setting Up Agreements

To set up agreements, use the Define Agreement component (WP\_AGREEMENT). This section lists prerequisites, common elements, and discusses how to define agreement, calculations, investment methods, details and company investment details.

### Pages Used to Set Up Agreements

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Agreement Page</u>	WP_AGREEMENT_TBL	Define basic details of the agreement, such as agreement type, status, scope, and agreement duration. You can also attach the agreement document to the agreement from this page.
<u>Computation Page</u>	WP_AGRT_COMP_TBL	Define how the global fund is calculated and distributed to employees at the end of a reference period.
<u>Investment Page</u>	WP_AGRT_INVEST_TBL	Define the investment methods for the agreement.
<u>Company Investment Page</u>	WP_AGRT_INVES3_SEC	Enter the interest rate paid on the company investment.
Bond, FCP, or SICAV	WP_AGRT_INVES2_SEC	Specify the ISIN number for the investment and the financial organization that manages the global fund.

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<u>Company Saving Account Paget</u>	WP_AGRT_INVES4_SEC	Enter the name and address of the financial organization that manages the investment.
<u>Company Stock Page</u>	WP_AGRT_INVES1_SEC	Enter details of the company stock ticker symbol and the financial organization name and address.

## Prerequisites

Before you can set up agreements you must define the following:

- Variables and formulas for global fund calculations.
- (Optional) Agreement groups if your agreement is for a group of companies or establishments.

## Related Links

[Setting Up Variables and Formulas](#)

[Defining Agreement Groups](#)

## Common Elements Used in This Section

<b>Field or Control</b>	<b>Description</b>
<b>ISIN Code</b> (International Securities Identification Number code)	Enter the number for the FCP (Fond Commun de Placement) or SICAV (Société d'Investissement à Capital Variable) investments.
<b>Financial Organization</b>	Enter the name of the company that manages the investment of the global funds. Enter the company's address in the <b>Financial Organization Address</b> field.

## Agreement Page

Use the Agreement page (WP AGREEMENT\_TBL) to define basic details of the agreement, such as agreement type, status, scope, and agreement duration.

You can also attach the agreement document to the agreement from this page.

Navigation:

- **Set Up HCM > Product Related > Compensation > Profit Sharing FRA > Define Agreement > Agreement**
- **Compensation > Profit-Sharing FRA > Review Agreement > Agreement**

This example illustrates the fields and controls on the Agreement page. You can find definitions for the fields and controls later on this page.

Agreement ID KF1

\*Long Description Profit Sharing Agreement for Company KF1

Short Description KF1

\*Agreement Type Profit Sharing

\*Agreement Status Approved

Approval Date 07/01/2002

\*Agreement Start Date 01/01/2000

Unavailability Duration 5 Years

\*Currency Code EUR euro

Agreement Duration Undetermined

Agreement Scope Company KF1 Business Institute - France

Agreement Group

Attach Agreement Document

Field or Control	Description
Agreement Type	Select <i>Profit Sharing</i> or <i>Worker's Participation</i> . The system hides or displays fields depending on the agreement type you select.
Agreement Status	Select a status. Values are:  <i>Construction in Progress</i> : Denotes an agreement that is under discussion and not yet agreed. Employees can't view details of agreements with this status.  <i>Approved</i> : Denotes an agreement that has been signed by all relevant organizations. Employees can view and adjust details of agreements with an <i>Approved</i> status.  <i>On Hold</i> : Denotes an agreement that has been started but is not in use. Use this status if, for example, an agreement is rejected by an organization that is involved in the discussion process. Employees can't view details of agreements with this status.
Approval Date	Enter the date when the agreement was signed. Normally, agreement approved within one year of the reference period end date. If this date is passed, legal requirements can affect the definition of some fields in the agreement. The system checks the Approval Date and issues a warning message if it is more than a year after the reference period end date. However, the system does not change the agreement definition. Update the agreement, if necessary, to meet the legal requirements.  This field appears only if you select <i>Approved</i> in the <b>Agreement Status</b> field.

<b>Field or Control</b>	<b>Description</b>
<b>Unavailability Duration</b>	<p>Enter the number of days, months, or years after the reference period end date that profit sharing funds are unavailable to employees. This field determines the availability and payment date for funds.</p> <p>This field appears only if you select <i>Profit Sharing</i> in the <b>Agreement Type</b> field.</p>
<b>Agreement Start Date</b>	Enter the date when the agreement is effective.
<b>Agreement End Date</b>	<p>Enter the date on which the agreement expires.</p> <p>This field appears only if you select <i>Determined</i> in the <b>Agreement Duration</b> group box.</p>
<b>Attach Agreement Document</b>	<p>Click to attach the agreement document to the agreement. The system displays a search page on which you enter the document path and file name or browse for the document.</p> <p>When the agreement is approved, employees can view the attachment online.</p>

## Agreement Duration

Complete this group box for profit-sharing agreements only. For worker's participation agreements the duration is set to **Determined** by the system and can't be changed.

<b>Field or Control</b>	<b>Description</b>
<b>Undetermined</b>	Select if the agreement duration is not fixed.
<b>Determined</b>	Select if the agreement is valid for a fixed period.

## Agreement Scope

<b>Field or Control</b>	<b>Description</b>
<b>Company</b>	Select if the agreement applies to a single company. Select the company name from the available options.
<b>Agreement Group</b>	<p>Select if the agreement applies to a group of companies or establishments and select the <b>Agreement Group</b>.</p> <p>Define agreement groups before you set up the agreement.</p>

## Related Links

[Defining Agreement Groups](#)

## Computation Page

Use the Computation page (WP\_AGRT\_COMP\_TBL) to define how the global fund is calculated and distributed to employees at the end of a reference period.

Navigation:

- **Set Up HCM > Product Related > Compensation > Profit Sharing FRA > Define Agreement > Computation**
- **Compensation > Profit-Sharing FRA > Review Agreement > Computation**

This example illustrates the fields and controls on the Computation page. You can find definitions for the fields and controls later on this page.

## Eligibility Criteria

Field or Control	Description
<b>Seniority</b>	<p>Select this check box if employee eligibility is determined by length of service.</p> <p>If the check box is not selected, anyone employed by the companies and establishments defined on the Agreement page is eligible for profit sharing.</p>
<b>Seniority Eligibility Duration</b>	<p>Enter the minimum period that employees must be employed by the organization before they are eligible to share in the funding available.</p> <p>This field is available if you select the <b>Seniority</b> check box.</p>

## Profit-Sharing Computation

Use this group box to define the formulas that are used to calculate the funding and distribution for the agreement. Define formulas on the Agreement Formulas page.

<b>Field or Control</b>	<b>Description</b>
<b>Computation Level</b>	<p>For profit-sharing agreements <i>Computation Level</i> doesn't appear because formulas and distribution methods are always defined at the agreement level.</p> <p>Select a value for worker's participation agreements. Values are:</p> <p><i>Agreement Level</i>: Indicates that the formulas and distribution method apply to all establishments and employees covered by the agreement. The Agreement Scope group box on the Agreement page defines the companies and establishments covered by the agreement. You must define formulas at the Agreement Level in addition to any establishment or work unit level calculations. This provides default formulas for employees who don't belong to any establishments or work units specified in this group box.</p> <p><i>Establishment Level</i>: Enables you to define different formulas and distribution methods for each establishment. Formulas defined at this level apply to employees within the establishment only. Select the establishment from the available options.</p> <p><i>Work Unit Level</i>: Enables you to define different formulas and distribution methods for groups of employees. Formulas defined at this level apply to employees within the work unit only. Use the group build functionality to define work units.</p>
<b>Funding Formula</b>	<p>Select the formula that calculates the global fund amount. The legal formula delivered by PeopleSoft, <i>LEGAL_RSP</i>, is for profit-sharing agreements.</p> <p><b>Note:</b> For profit-sharing agreements if you don't use the <i>LEGAL_RSP</i> formula, make sure that your organization's formula does not produce a result that is less than that of the legal formula.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Global Fund Limit Formula</b>	<p>Select the formula that defines the global fund limit. The Compute Global Fund process uses this formula to limit the global fund amount. PeopleSoft delivers the following statutory formulas:</p> <p><i>LEGAL_MAX1, LEGAL_MAX2, LEGAL_MAX3, and LEGAL_MAX4:</i> These formulas may be useful for profit-sharing agreements, if you haven't selected the legal formula <i>LEGAL_RSP</i> in the <b>Funding Formula</b> field. If the global fund calculated using the Funding Formula exceeds the maximum defined by the Global Fund Limit Formula, the process reduces the global fund to the maximum.</p> <p><i>KF20PCTMS:</i> This formula may be used for worker's participation agreements.</p>
<b>Individ. Salary Limit Formula</b> (individual salary limit formula)	<p>Select the formula that defines the maximum salary amount used in the distribution calculation. Some distribution calculations use employees' salaries to determine their share of the funding. Use this field to force a limit on the salary amount used in the calculation.</p> <p>Select the <b>Prorate</b> check box if you want to prorate the limit for employees who did not work for the whole reference period. For example, if the limit is 20,000 EUR and an employee worked only half of the reference period, if you select <b>Prorate</b>, the limit applied to the employee's salary is 10,000 EUR.</p>
<b>Individual Alloc Limit Formula</b> (individual allocation limit formula)	<p>Select the formula that defines the maximum amount that each employee receives from profit sharing. For example, if the system calculates that an employee's allocation is 2000 EUR, but this formula sets the limit to 1500 EUR, then the employee will receive 1500 EUR.</p> <p>Select the <b>Prorate</b> check box if you want to prorate the limit for employees who did not work for the whole reference period.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Rounding Rule</b>	<p>Select a rounding rule if you want the system to round employees' profit-sharing amount, deductions, and interest. The system rounds both gross and net amounts. Values are:</p> <p><i>Standard</i>: Rounds the results up or down. For example, if you specify 2 in the Decimal Places field, the result is rounded up if the digit in the third decimal place is 5 or more and it is rounded down if the digit is 4 or less. Therefore, 5154.525 is rounded to 5154.53 and 5154.523 is rounded to 5154.52.</p> <p><i>Up</i>: Rounds the result up to the number of decimal places specified in <b>Decimal Places</b> field.</p> <p><i>Down</i>: Rounds the result down to the number of decimal places specified in <b>Decimal Places</b> field.</p>
<b>Decimal Places</b>	<p>Enter the number of decimal places to which amounts are rounded. The system rounds the final amount only; all other intermediate calculations are not rounded.</p>

## Distribution Method

This group box defines how the global fund is distributed. Enter percentages of up to 2 decimal places. If you are setting up a worker's participation agreement, you can define different distribution methods at the agreement, establishment, or work unit level.

You can divide the global fund between employees based on one or more of the criteria described below:

<b>Field or Control</b>	<b>Description</b>
<b>Prorate with Salary</b>	<p>Enter the percentage of employees' funds that are based on their salaries. This part of each employee's fund is calculated with the following formula:</p> $\text{global fund} \times (\text{employee annual salary} / \text{total annual payroll})$ <p>For worker's participation agreements, the system uses the variable KFMS to determine the total annual payroll of all employees. This variable is also used by the Compute Global Fund process if you specify the KF20PCTMS formula as the global fund limit formula. If you want the formula and the process to be based on different totals, you must create a new global fund limit formula for your worker's participation agreement which doesn't reference the KFMS variable.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Prorate with Working Duration</b>	<p>Enter the percentage of employees' funds that are based on the number of days they worked during the reference period. This part of an employee's fund is calculated with the following formula:</p> $\text{global fund} \times (\text{employee work days} / \text{total days in the reference period})$ <p>The number of employee work days excludes most unpaid absence. However, some unpaid absence days, including maternity leave are included in the work day count.</p>
<b>Uniform Distribution</b>	<p>Enter the percentage of employees' funds that are based on the number of eligible employees. This part of an employee's fund is calculated with the following formula:</p> $\text{global fund} / \text{total eligible employees}$
<b>Total (%) (total percentage)</b>	<p>Displays the total of all three distribution methods.</p> <p><b>Note:</b> To save this page, the total must be 100 percent.</p>

You can use a mixture of all these methods to calculate the final profit share amount. Consider the following example:

Total fund	10,000 EUR
Total eligible employees	10
Total payroll for reference period	240,000 EUR
Total days in reference period	1000
Distribution Method:	
<b>Prorate with Salary</b>	30%
<b>Prorate with Working Duration</b>	30%
<b>Uniform Distribution</b>	40%

For an employee with an annual salary of 15000 EUR and 100 days worked, the employee's fund is calculated as follows:

**Note:** The example shown assumes that the salary does not exceed the individual salary limit and is not prorated.

Profit share based on employee salary:	$10000 * (15000 / 240000) * (30/100) = 187.5$
Profit share based on days worked:	$10000 * (100 / 1000) * (30/100) = 300$
Profit share based on eligible employees:	$(10000 / 10) * (40 / 100) = 400$
Employee's Total Profit Share:	$187.5 + 300 + 400$

## Investment Page

Use the Investment page (WP\_AGRT\_INVEST\_TBL) to define the investment methods for the agreement.

Navigation:

- **Set Up HCM > Product Related > Compensation > Profit Sharing FRA > Define Agreement > Investment**
- **Compensation > Profit-Sharing FRA > Review Agreement > Investment**

This example illustrates the fields and controls on the Investment page. You can find definitions for the fields and controls later on this page.

Proposed Investments		Personalize   Find   View All   <input type="button" value="New"/>   <input type="button" value="Print"/>   First <input type="button" value="1"/> 1-3 of 3 <input type="button" value="Last"/>	
*Investment Method	*Description	Details	Proposed By Default
1 Company Stock	Profit sharing invests in the company's stocks	<input type="button" value="Details"/>	<input type="checkbox"/>
2 Company Investment	Profit sharing invests in the company	<input type="button" value="Details"/>	<input checked="" type="checkbox"/>
3 Company Saving Account (PEE)	Profit sharing invests in the company's PEE	<input type="button" value="Details"/>	<input type="checkbox"/>

Profit-Sharing Surplus	Interest Re-Investment Option
<input checked="" type="radio"/> Carryover	<input checked="" type="radio"/> Immediate
<input type="radio"/> Immediate Re-Share	<input type="radio"/> Re-Invest

## Proposed Investments

Field or Control	Description
<b>Investment Method</b>	<p>Select the investment methods available for the agreement type.</p> <p><i>Bonds</i>: For profit-sharing agreements only.</p> <p><i>Company Investment</i>: For profit-sharing agreements only.</p> <p><i>Company Savings Account (Plan Epargne Entreprise [PEE])</i>.</p> <p><i>Company Stock</i>: For profit-sharing agreements only.</p> <p><i>Employee's Bank Account</i>: For worker's participation agreements only. Funds are transferred to the employee's bank account which is defined on the Bank Accounts page.</p> <p><i>FCP (Fond Commun de Placement)</i>: For profit-sharing agreements only.</p> <p><i>SICAV (Société d'Investissement à Capital Variable)</i>: For profit-sharing agreements only.</p> <p><i>Time Saving Account</i>: For worker's participation agreements only.</p> <p>If an agreement has multiple investment methods, employees can select their investment method using the Agreement Personalization component or the Agreement Personalization self-service transaction.</p>
<b>Details</b>	<p>Click to access an investment detail page on which you enter details about the investment method. This button is hidden for some investment methods.</p>
<b>Proposed by Default</b>	<p>Select if the investment method is the default value. The default investment method is applied, unless an employee selects a different investment.</p>

## Profit Sharing Surplus

A surplus may occur when some funds remain after the initial distribution is calculated, due to limit formulas being applied. Use this group box to specify how the system manages surplus amounts.

<b>Field or Control</b>	<b>Description</b>
<b>Carryover</b>	Select to add the surplus to the global fund for the next reference period. This option is available for profit-sharing agreements only. View the surplus using the Review Reference Period component.
<b>Immediate Re-share</b>	Select if you want to distribute the surplus among the eligible employees for the current reference period. The system recalculates the employees' fund to include a share of the surplus.
<b>None</b>	Select to ignore any surplus. If you select this option, the system doesn't distribute the surplus nor carry the surplus over to the next reference period. This option is available for worker's participation agreements only.

## Interest Re-investment Option

This group box is for profit-sharing agreements with *Company Investment* selected as the investment method. Use it to specify how the interest earned on global funds is managed. Global funds accrue interest during the period that the funds are unavailable to employees. This period is defined on the Agreement page by the **Unavailability Duration** field.

<b>Field or Control</b>	<b>Description</b>
<b>Immediate</b>	Select to pay interest to eligible employees. Interest is paid yearly on the first day of the fourth month after the end of the fiscal year. For example, for the reference period 2001, interest is calculated as of April 1, 2002 and paid on April 1, 2003, April 1, 2004, and so on until funds are released.
<b>Re-Invest</b>	Select to add the interest to the global fund. At the end of each interest period calculation, interest is added to the global fund. The next interest period calculation is based on this increased global fund.

**Note:** Employees can change this setting, using the Agreement Personalization component or the Agreement Personalization self-service transaction, when the agreement status is Approved.

## Related Links

“Entering Bank Account Information” (PeopleSoft Human Resources Administer Workforce)

[Understanding Employee Options](#)

“Understanding the Profit-Sharing Self-Service Transactions” (PeopleSoft eCompensation)

## Company Investment Page

Use the Company Investment page (WP\_AGRT\_INVES3\_SEC) to enter the interest rate paid on the company investment.

Navigation:

Click the **Details** button on the Investment page with *Company Investment* selected as the investment method.

This example illustrates the fields and controls on the Company Investment page. You can find definitions for the fields and controls later on this page.

The screenshot shows a grid titled 'Interest Rates' with one row of data. The columns are labeled 'Effective Date', 'Status', and 'Interest Rate'. The data in the grid is as follows:

Effective Date	Status	Interest Rate
01/01/2000	Active	5.000000

Below the grid are buttons for 'OK', 'Cancel', and 'Refresh'.

Field or Control	Description
Interest Rate	Enter the interest rate (percent) for the company investment. Interest rates are effective-dated so that you can track interest rate history.

## Company Saving Account Page

Use the Company Saving Account page (WP\_AGRT\_INVES4\_SEC) to enter the name and address of the financial organization that manages the investment.

Navigation:

Click the **Details** button on the Investment page with *Company Savings Account* selected as the investment method.

This example illustrates the fields and controls on the Company Savings Account page. You can find definitions for the fields and controls later on this page.

**Investment**

Investment Method Company Saving Account (PEE)

Internal  
 External

**Financial Organization Address**

Country	FRA	France
Address	<a href="#">Edit Address</a>	

**OK** **Cancel** **Refresh**

<b>Field or Control</b>	<b>Description</b>
<b>Internal</b>	Select if the company saving account is owned by your organization.
<b>External</b>	Select if the company savings account is managed by a different organization
<b>Edit Address</b>	Click this link to access the Edit Address page where you enter the address of the organization that manages the company saving account. The address information is included in the agreement profit sharing report and administrators use this information when transferring funds.

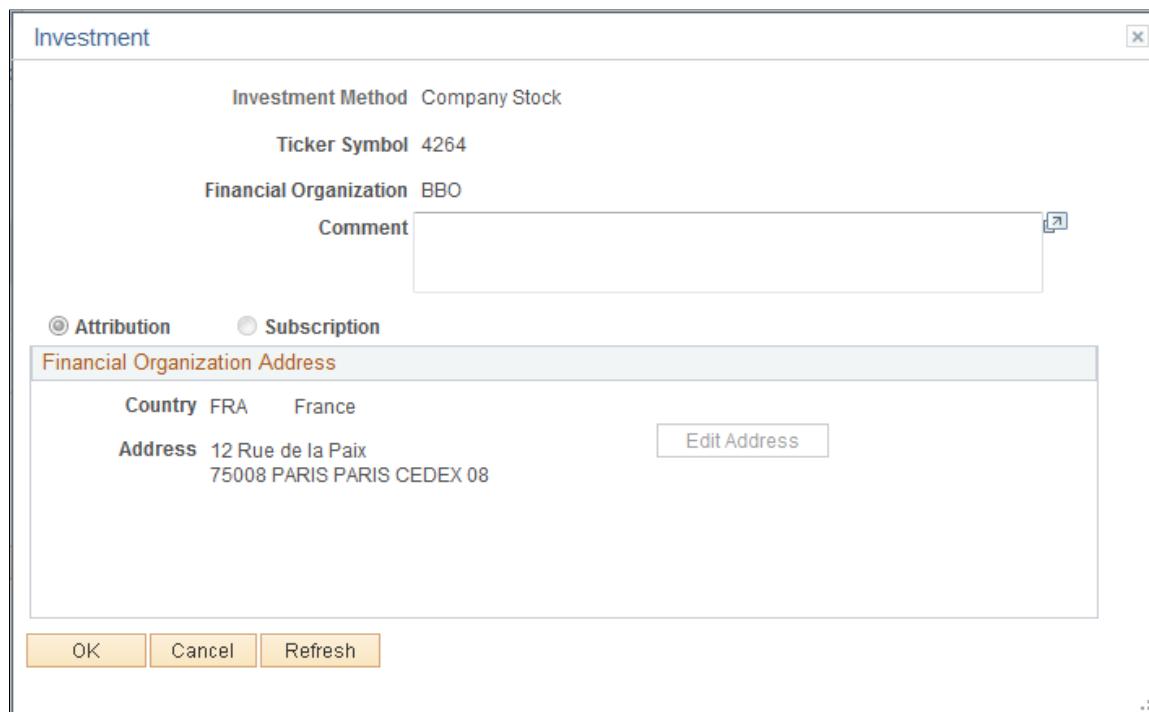
## Company Stock Page

Use the Company Stock page (WP\_AGRT\_INVES1\_SEC) to enter details of the company stock ticker symbol and the financial organization name and address.

Navigation:

Click the **Details** button on the Investment page with *Company Stock* selected as the investment method.

This example illustrates the fields and controls on the Company Stock page. You can find definitions for the fields and controls later on this page.



The screenshot shows the 'Investment' dialog box. At the top, it displays the 'Investment Method' as 'Company Stock', 'Ticker Symbol' as '4264', and 'Financial Organization' as 'BBO'. Below these, there is a 'Comment' text area with a small edit icon. Under the 'Comment' section, there are two radio buttons: 'Attribution' (selected) and 'Subscription'. A 'Financial Organization Address' section follows, containing a 'Country' field set to 'FRA' (France) and an 'Address' field with the value '12 Rue de la Paix 75008 PARIS PARIS CEDEX 08'. An 'Edit Address' button is located to the right of the address field. At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Refresh'.

<b>Field or Control</b>	<b>Description</b>
<b>Ticker Symbol</b>	Enter the symbol used for your company's stock.
<b>Attribution</b>	Select if employees receive company stock from the investment.
<b>Subscription</b>	Select if the investment provides employees with the right to buy company stock.

## Setting Up Reference Periods

To set up reference periods, use the Reference Period component (WP\_AGRT\_PERIOD). This section provides overviews of reference periods and payroll information and discusses how to set up reference period and define payroll mapping.

### Pages Used to Set Up Reference Periods

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
Reference Period Page	WP_AGRT_PERIOD	Create and approve reference periods.

Page Name	Definition Name	Usage
<a href="#">Payroll Mapping Page</a>	WP_AGRT_PERIOD_SEC	Define payroll data required by the profit sharing calculations.

## Understanding Reference Periods

Profit sharing calculations are based on company or establishment accounting data over a period known as a reference period. Typically, reference periods are for a year and match the fiscal year. However, you can create reference periods for any period to suit your organizational requirements.

At the end of the reference period, when company information is available and employee salaries are finalized, the administrator schedules the profit sharing processes to calculate and distribute the global fund.

Agreements can cover one or more reference periods, depending on the agreement type and the agreement setup:

- Worker's participation agreements (intéressement des salariés) are typically for three years.

If the reference period is a year, you create three reference periods, one for each year. However, if the reference period is three months, you define 12 reference periods for the agreement (4 reference periods a year \* 3 years).

- Profit-sharing agreements (participation aux résultats) can have a fixed duration or an unspecified duration.

If the duration is not defined, the administrator can create any number of reference periods.

You set up reference periods for an agreement only after the agreement is signed by all the relevant groups and the status is set to *Approved*.

To define reference periods for an agreement, you need to:

- Define how the Manage Profit Sharing business process imports information from your payroll system.

This is defined for each reference period. The distribution calculations require employee payroll information, which is imported when the Extract Eligible Employees process runs.

- (Optional) Define the Carry Forward and Carry Over amounts for each reference period.

This applies to profit-sharing agreements only. When part of the global fund remains after distribution to employees, you can specify that the surplus is added to the fund for the next reference period.

Equally, a surplus in the previous reference period can result in an amount being added to the current reference period. These values are automatically calculated by the system, but you can override the calculated values before running the remaining processes.

## Understanding How to Set Up Payroll Information

This section discusses:

- Importing data from PeopleSoft Global Payroll for France.
- Importing data from other payroll systems.

When you set up a reference period, you must define where employee payroll information is stored because this is required for distributing the global fund.

The amount that an employee receives from profit sharing can be based on one or more of these parameters:

- Gross salary.
- Days worked in the reference period.
- Number of eligible employees.

For the Distribute Global Funds process to calculate the profit share based on salary and days worked, it requires each employee's gross salary and total days worked during the reference period.

These values must take into account absences. Generally, absences reduce the employees' gross salary and the total working days for the period. However, the following types of absence must not be deducted from the employees' total working days count and their gross salary amount:

- Paid vacations.
- Maternity leave.
- Adoption leave.
- Work accidents (except accidents that occur on journey between home and workplace).
- Absence due to occupational illness (maladie professionnelle).

The gross salary includes all compensation and benefits, before contributions such as the social security contribution and retirement contribution are deducted.

See [Computation Page](#).

This payroll information is imported from one of two sources:

- Global Payroll for France.
- A record in the database that has been populated from other payroll systems.

The system checks the employee's job data, as of the reference period end date, to determine which source to use for the import. If the **Payroll System** field on the Job Data - Payroll page is *Global Payroll*, the system imports from Global Payroll for France. If the **Payroll** field is set to any other value, the system imports from a record in the database.

## Importing Data from Global Payroll for France

PeopleSoft provides the following elements in Global Payroll for France for use with the Manage French Profit Sharing business process:

- Accumulators to track employees' gross salary for the reference period.
- Accumulators to track the number of days worked in the reference period.

- Earnings from profit share or worker's participation agreements.

The accumulators automatically include the paid absences that must be included in the salary and number of days worked. PeopleSoft delivers separate accumulators and earnings for profit sharing and worker's participation agreements to allow for agreements that are based on different data. However, if your agreements are based on the same employee payroll information, you can remove the unused accumulators from the section PAR SE PARTICIP. This section is used to trigger the calculation of the accumulators used for the profit-sharing distribution.

See “Setting Up Sections” (PeopleSoft Global Payroll).

## Importing Data from Other Payroll Systems

If you don't have Global Payroll for France installed, you must populate a record in your database with employee payroll information. PeopleSoft delivers the record *PS\_WP\_EXT\_PAYDATA* for this purpose.

The table below lists the fields in the *PS\_WP\_EXT\_PAYDATA* record:

Field Name	Type	Length	Description
WP AGREEMENT_ID	Char	5	Agreement ID.
PERIOD_ID	Char	12	Reference Period ID.
EMPLID	Char	11	Employee ID.
EMPL_RCD	Number	3	Employee Record ID.
GROSS_PAY	Number	6.2	Employee's relevant gross salary for the reference period.
DAYS	Number	3	Employee's relevant working days for the reference period.
CURRENCY_CD	Char	3	Currency code for the gross salary amount.

## Reference Period Page

Use the Reference Period page (WP\_AGRT\_PERIOD) to create and approve reference periods.

Navigation:

- **Set Up HCM > Product Related > Compensation > Profit Sharing FRA > Reference Period > Reference Period**
- **Compensation > Profit-Sharing FRA > Review Reference Period > Reference Period**

This example illustrates the fields and controls on the Reference Period page - Period tab. You can find definitions for the fields and controls later on this page.

Reference Period

Agreement ID KF1 Profit Sharing Agreement for Company KF1

Reference Periods		Personalize   Find    First  1-2 of 2  Last	
Period	Carryover		
*Reference Period	From Date	Thru Date	*Status
2001	01/01/2001	12/31/2001	Construction in Progress
2002	01/01/2001	12/31/2001	Construction in Progress
			Status Date Personalization Deadline
			06/04/2002  
			Payroll Map  
			Payroll Map  

Field or Control	Description
<b>Reference Period</b>	Enter the reference period ID. The system populates a reference period ID that you can override.
<b>From Date and Thru Date</b>	<p>Enter the period start and end dates. The system automatically populates these dates based on the agreement approval date or the dates of existing reference periods. You can override these default dates.</p> <p>If you haven't created reference periods for the agreement, the system populates the date fields for the year previous to the approval date, as follows:</p> <ul style="list-style-type: none"> <li>From Date is set to January 1 of the year before the agreement approval date.</li> <li>Thru Date is set to December 31 of the year before the agreement approval date.</li> </ul> <p>The agreement approval date is defined on the Agreement page.</p> <p>If there are existing reference periods, the system populates the date fields starting the new reference period immediately after the end of the latest period with the same duration as the existing period.</p>
<b>Status</b>	<p>When you add the period initially, the system sets the status to <i>Construction in progress</i> and changes it to <i>Computed</i> when you run the Process Interest and Payment Application Engine process (HR_WP_PAYMT).</p> <p>After reviewing the profit sharing amounts calculated by the process, change the status to <i>Approved</i>. Once you set the status to <i>Approved</i>, you can't make other changes to the reference period.</p> <p><b>Note:</b> Employees can view their fund information only when the reference period status is <i>Approved</i>.</p>

Field or Control	Description
<b>Personalization Deadline</b>	<p>Enter the last date on which employees can change the investment method or interest reinvestment options using the Agreement Personalization component or the self-service transactions. After this date, employees cannot change these agreement settings and funds can be transferred to the financial organization specified or paid through your payroll system.</p> <p>If employees receive a payment or a transfer is completed before the personalization deadline, the system doesn't allow employees to update their agreement settings from this payment or transfer date.</p> <p><b>Note:</b> If you don't define a date, the system automatically prevents employees updating their agreement settings once the first reference period is approved.</p>
<b>Payroll Map</b>	<p>Click this button to define the location of payroll information. Profit sharing calculations depend on data imported from your payroll system.</p>

This example illustrates the fields and controls on the Reference Period page - Carryover tab. You can find definitions for the fields and controls later on this page.

**Reference Period**

Agreement ID KF1 Profit Sharing Agreement for Company KF1

Reference Periods		Personalize   Find	First  1-2 of 2
Period	Carryover		
2001	0.000000	0.000000	
2002	0.000000	0.000000	

Field or Control	Description
<b>Carry Over Amount</b>	<p>This field shows the amount carried over from the previous reference period. The Compute Global Fund process adds this amount to the global fund calculated.</p>
<b>Carry Forward Amount</b>	<p>This field is for profit-sharing agreement types only. It shows the surplus amount that will be added to the global fund for the next reference period. This is calculated by the Distribute Global Funds process if you selected the Carryover option on the Investment page.</p>

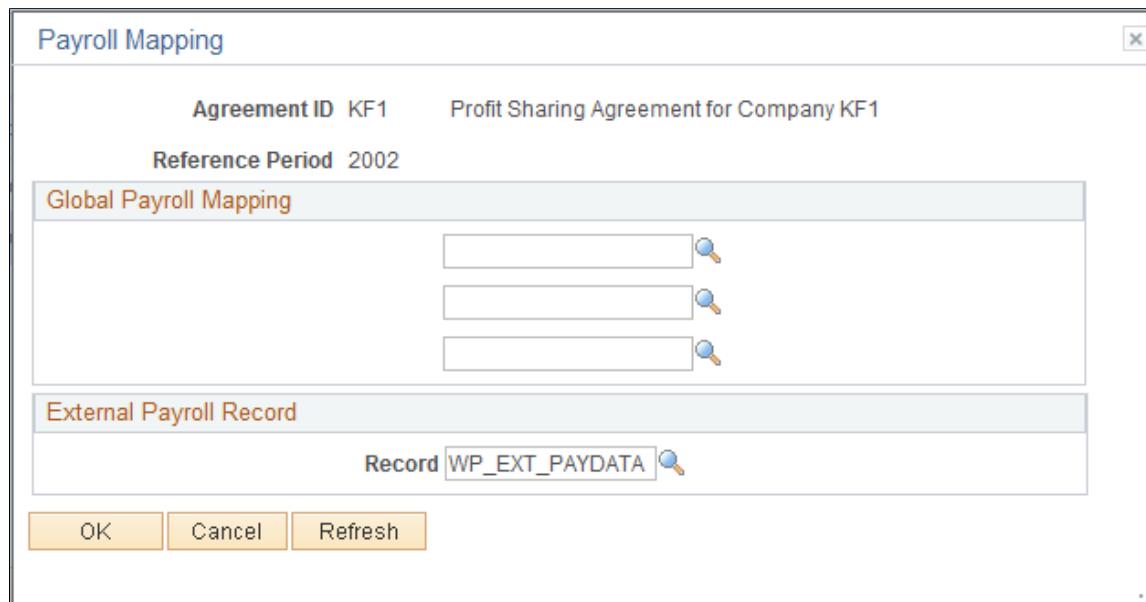
## Payroll Mapping Page

Use the Payroll Mapping page (WP\_AGRT\_PERIOD\_SEC) to define payroll data required by the profit sharing calculations.

Navigation:

Click the **Payroll Map** button on the Reference Period page.

This example illustrates the fields and controls on the Payroll Mapping page. You can find definitions for the fields and controls later on this page.



Use this page to define the location of payroll information that is required for profit sharing. If you make changes to this page after running the Extract Eligible Employees process, you must rerun the process to take account of the modifications. You can't make changes to this page once the reference period status is *Approved*.

---

**Note:** If your organization uses Global Payroll for France and other payroll systems, define both **Global Payroll Mapping** and **External Payroll Mapping**. If you define both group boxes, the system uses the Payroll System field in the employee's job data to determine which source to use for the import.

---

## Global Payroll Mapping

The system displays this group box if you have Global Payroll for France installed.

<b>Field or Control</b>	<b>Description</b>
<b>Gross Salary Accumulator</b>	<p>Select the accumulator defined in Global Payroll for France that stores employees' gross salary. PeopleSoft provide the following accumulators as standard:</p> <p><i>PAR AC SAL PART SG</i> for profit-sharing agreements.</p> <p><i>PAR AC SAL INT SG</i> for worker's participation agreements.</p> <p>These accumulators store employees' gross salary during the reference period. This includes paid absences and some unpaid absences, such as maternity leave. The employees' gross salary is used by the Distribute Global Funds process to calculate employees' funds.</p>
<b>Working Days Accumulator</b>	<p>Select the accumulator defined in Global Payroll for France that track employees' working days in a reference period. PeopleSoft provide the following accumulators as standard:</p> <p><i>PAR AC PRE PART SG</i> for profit-sharing agreements.</p> <p><i>PAR AC PRE INT SG</i> for worker's participation agreements.</p> <p>These accumulators store employees' working days, including paid absences and some unpaid absences, such as maternity leave. This is used by the Distribute Global Funds process to calculate employees' profit-sharing amount.</p>
<b>Payment Earning</b>	<p>Select the earning defined in Global Payroll for France for the payment of profit-sharing or worker's participation amounts. This earning is generated during payment processing. PeopleSoft delivers the following earnings as standard:</p> <p><i>INTERESSEMEN</i> for profit-sharing agreements.</p> <p><i>PARTICIPATIO</i> for worker's participation agreements.</p>

## External Payroll Mapping

If you use an external payroll system for some employees you must populate a record with payroll information required for the profit-sharing calculations.

<b>Field or Control</b>	<b>Description</b>
<b>Record Name</b>	<p>Select the record that stores your payroll information. PeopleSoft delivers the <i>PS_WP_EXT_PAYDATA</i> record that has the correct structure. If you use a different record make sure that the record has the same field names, types, and length as those defined in <i>PS_WP_EXT_PAYDATA</i>.</p>

## Related Links

[Computation Page](#)

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## Setting Up Workflow for Profit Sharing

PeopleSoft delivers workflow for the Manage French Profit Sharing business process that enables automatic notification of profit sharing events to employees and compensation administrators. This table lists the events that trigger workflow:

<b>Event</b>	<b>Role</b>	<b>Description</b>
Employee termination.	Employee	Employees who are leaving receive an email informing them that they are entitled to profit sharing and can request a release or organize transfer of funds. A worklist entry directs the employee to the Agreement Personalization page.
Terminated employee enters transfer information.	HR Administrator FRA	An email informs the administrator about terminated employees who have entered transfer information. A worklist entry directs the administrator to the Member Entitlements page.
Employee submits request for fund release.	HR Administrator FRA	An email informs the administrator about new requests and a worklist entry directs the administrator to the Member Entitlements page.
Administrator approves or rejects fund release request.	Employee	An email is sent to the employee that includes the agreement ID, and the reference period ID for the request that has been approved or rejected.
The Process Interest and Payment process sets fund status to <i>Available</i> .	Employee	Emails are sent to employees when funds are available.

<b>Event</b>	<b>Role</b>	<b>Description</b>
The Process Interest and Payment process sets fund status to <i>Paid</i> .	Employee	Emails are sent to employees when a payment has been processed by Global Payroll for France or another payroll system.
The Process Interest and Payment process sets fund status to <i>Error</i> .	HR Administrator FRA	An email informs the administrator if errors occur in payment processing.

## Related Links

[Understanding Member Information and Fund Release Requests](#)

[Running the Process Interest and Payment Application Engine Process \(HR\\_WP\\_PAYMT\)](#)

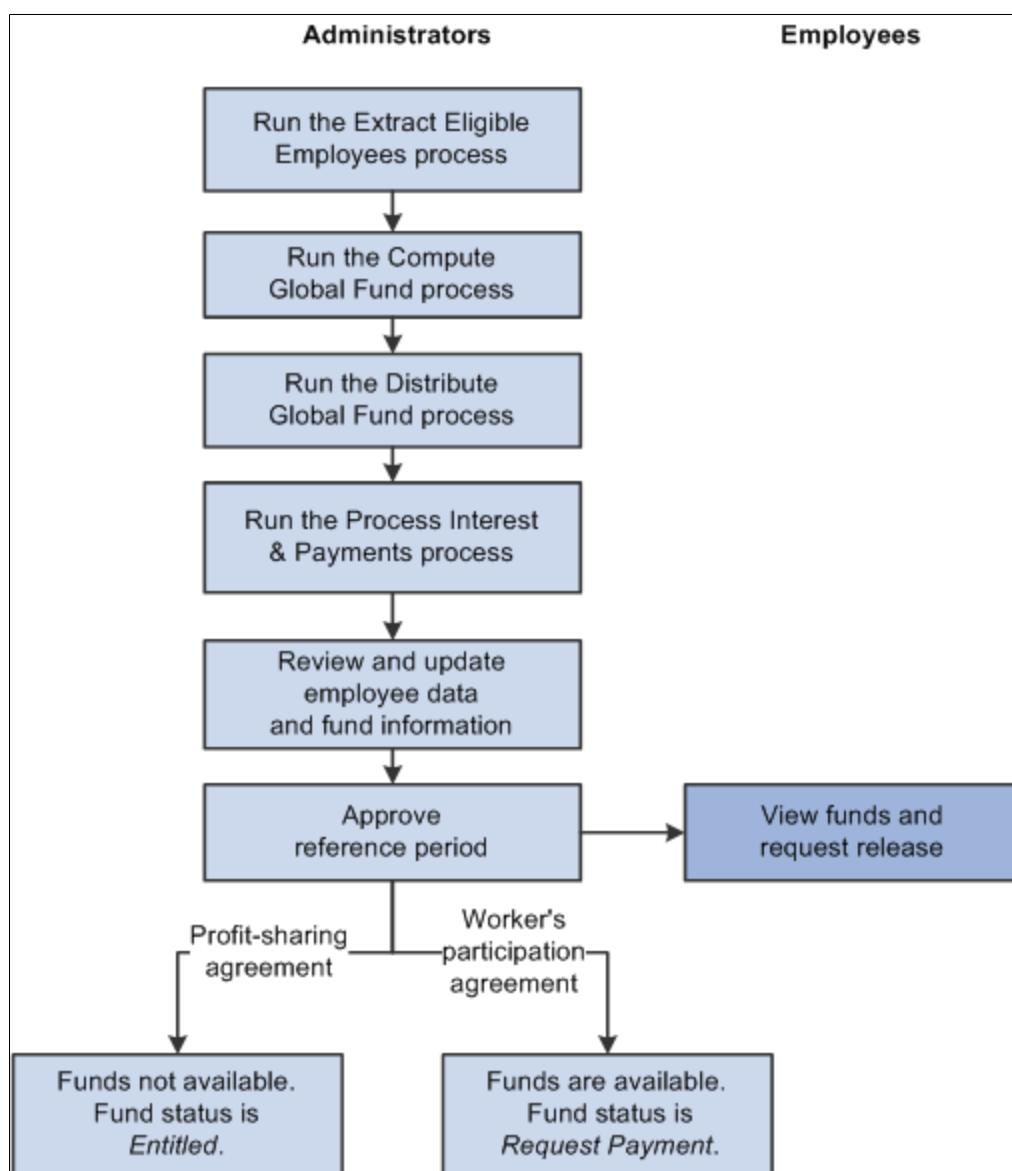
“Delivered Workflows for Manage French Profit Sharing” (Application Fundamentals)

# Running the Profit Sharing Processes

## Understanding the Profit Sharing Processes

At the end of a reference period, the compensation administrator runs the profit sharing processes to calculate the global fund available and each employee's share of the fund. This diagram illustrates the steps involved in the profit sharing processes:

Logical flow for running various profit sharing process.



The four profit sharing processes that must be run are:

- Extract Eligible Employees.

This is the first process that you must run. It compiles a list of employees who are entitled to share the global fund. It also imports payroll information for eligible employees from PeopleSoft Global Payroll for France or from a specified record in the database.

- Compute Global Fund.

This process calculates the global fund available, based on the funding formulas defined in the agreement. For worker's participation agreements, there can be multiple formulas for different establishments or groups of employees (work units).

- Distribute Global Funds.

This process divides the global funds calculated by the Compute Global Fund process and distributes the fund according to the distribution methods specified in the agreement definition.

- Process Interest and Payment.

This is the final process that you must run. This process has a dual role: it completes the profit-sharing calculations and also processes payments. The process calculates deductions for employees' funds and calculates interest that is due for profit-sharing funds, using the *Company Investment* investment method. If you integrate your system with Global Payroll for France or another payroll system, the Process Interest and Payment process manages payments for profit sharing and worker's participation agreements.

Typically, you run the first three processes (Extract Eligible Employees, Compute Global Fund, and Distribute Global Funds) once for each reference period. However, you run the Process Interest and Payment process at intervals, because it processes payments, updates interest amounts and fund status, and calculates funds.

Compensation administrators can review the results of each process and make any adjustments necessary before running the next process in the sequence. The Member Entitlements component provides administrators with a view of the results generated by the eligibility and calculation processes. In addition, compensation administrators can rerun processes before moving on to the next stage.

## Related Links

[Understanding Member Information and Fund Release Requests](#)

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## Running the Eligibility and Calculation Processes

This section provides overviews of the Extract Eligible Employees process, the Compute Global Fund process, and the Distribute Global Funds process, and lists prerequisites, common elements, and the pages used to run the eligibility and calculation processes.

## Pages Used to Run the Eligibility and Calculation Processes

Page Name	Definition Name	Usage
Extract Eligible Employees	RUNCTL_WP_ELIG	Run the Extract Eligible Employees process for selected agreements and reference periods.
Compute Global Fund	RUNCTL_WP_FUND	Run the Compute Global Fund process to calculate the global funds available. You must run it after you have identified eligible employees using the Extract Eligible Employees process.
Distribute Global Funds	RUNCTL_WP_COMP	Run the Distribute Global Funds process to calculate each eligible employee's share of the global fund. You can run this process only after you have run the Extract Eligible Employees process and the Compute Global Fund process.

## Understanding the Extract Eligible Employees Application Engine Process (HR\_WP\_ELIGIB)

The Extract Eligible Employees process is the first process that you run. The purpose of this process is to determine who is eligible for a share of the funding, and import for each eligible employee gross salary and a count of days worked.

For each agreement that you specify on the run control page, the process compiles a list of employees in the company and establishments specified in the agreement.

For each employee, the process:

- Determines whether the employee is eligible as follows:
  - If you don't specify a minimum seniority on the Computation page (Define Agreement component), the system verifies that the employee worked for the company or establishment for at least one day during the reference period.
  - Calculates the employee's length of service, if you defined a minimum seniority for the agreement, using the employee's contract begin and end dates.

For employees with multiple contracts, the system calculates the total duration of all contracts during the reference period, and for the 12 months prior to the start of the reference period. Employees who don't meet the seniority criteria are not eligible for a share of the funds.

---

**Note:** If an employee is transferred to a different company during the reference period, and keeps the same contract number, the process adds the employee to the message log. You must check the list of transferred employees to determine whether they are eligible for profit sharing.

- Imports eligible employees' gross pay and the number of days worked during the reference period.

These amounts are used later by the Distribute Global Funds process to calculate the employee's fund. Payroll data is imported from accumulators defined in Global Payroll for France or from a record populated with employee payroll information.

You define the location of payroll data when you set up the reference periods for the agreement. The process checks employees' job data to determine whether to import data from Global Payroll for France or the external record.

- Calculates the employee's proration factor based on the number of days worked.

One of the distribution methods for dividing global funds between employees is based on the number of days that the employee worked during the reference period. The process calculates this proration factor by dividing the number of days worked by the total days, including weekend days, for the reference period (reference period end date through reference period begin date). You define the distribution methods on the Computation page.

Once this process is complete, the compensation administrator can review employees' gross salaries and proration factor, using the Member Entitlements page.

## Related Links

- [Understanding Member Information and Fund Release Requests](#)
- [Computation Page](#)
- [Payroll Mapping Page](#)

## Understanding the Compute Global Fund Application Engine Process (HR\_WP\_GBLFND)

The Compute Global Fund process is the second process to run, and you must run it after the Extract Eligible Employees process. The purpose of the Compute Global Fund process is to calculate the global fund amounts for the agreements that you specify on the run control page. Once this process is completed, the compensation administrator reviews the calculated amounts using the Member Entitlements pages.

The global fund is the total amount that is available for distribution between eligible employees. It is based on your organization's accounting information. To calculate the global fund, the process uses these formulas specified on the Computation page (Define Agreement component):

- Funding formula.
- Global fund limit formula.

This formula defines the global fund limit. For worker's participation agreements, PeopleSoft delivers the statutory formula, KF20PCTMS, that checks whether the global fund is more than 20 percent of the total payroll. If the result of the funding formula exceeds this limit, the process sets the global fund amount to this limit and issues a warning message.

For profit-sharing agreements, the process compares the global fund with the result of these formulas, if you don't specify the legal formula *LEGAL\_RSP* in the Funding Formula field:

- The global fund limit formula.

There are four possible limit formulas: `LEGAL_MAX1`, `LEGAL_MAX2`, `LEGAL_MAX3`, and `LEGAL_MAX4`. If the result of your funding formula is above the selected global fund limit formula, the process sets the global fund to the limit and issues a warning message.

- The `LEGAL_RSP` formula.

If the result of your funding formula exceeds the result calculated using the `LEGAL_RSP` formula, the process issues a warning message.

For profit-sharing agreements, there is only one funding formula and global fund limit formula per agreement. Therefore, the global fund is the same for all employees associated with that profit-sharing agreement.

However, for worker's participation agreements, it is possible to define formulas (and distribution methods) at the agreement, establishment, or work unit level. The Compute Global Fund process checks which formulas apply for each eligible employee and calculates the global fund amount according to those formulas. The process determines which formulas apply as follows:

- The work unit formulas override the formulas defined at the agreement or establishment level.

---

**Note:** The process can only use one set of formulas. Therefore, you must make sure that employees belong to one work unit only for each agreement. Use the Group Member Overlap report to determine whether employees belong to more than one work unit.

---

- The establishment formulas override the formulas defined at the agreement level.
- The agreement level formulas apply if an employee doesn't belong to any of the work units or establishments listed on the Computation page.

## Worker's Participation Example

Consider an example agreement, KF1. This agreement is for company GBL001, which includes establishments EST001, EST002, and EST003.

Agreement KF1 has different formulas and distribution methods for these establishments and work units:

<b>Computation Level</b>	<b>Establishment or Work Unit</b>
Establishment	EST001, EST002
Work Unit	WU1, WU2, WU3

If an employee belongs to:

- Establishment EST001 and work unit WU1, the system uses the formulas and distribution methods defined for work unit WU1.
- Establishment EST002 but none of work units WU1, WU2, or WU3, the system uses the formulas and distribution methods defined for establishment EST002.

- Establishment EST003, the system uses the formulas and distribution methods defined at the agreement level.

## Related Links

[Understanding Member Information and Fund Release Requests](#)

## Understanding the Distribute Global Funds Application Engine Process (HR\_WP\_SHARE)

You run the Distribute Global Funds process after the Compute Global Fund process. Using the global fund amounts that are calculated by the Compute Global Fund process, and the payroll information previously imported by the eligibility process, the Distribute Global Funds process calculates each employee's share of the fund.

The process:

- Calculates the employee's fund based on the distribution methods selected in the agreement definition. If an employee's fund exceeds the limit specified by the individual allocation limit formula (if this is defined), the process sets the employee's fund to the maximum and issues a warning message.
- Distributes any surplus, if the Immediate Re-share check box is selected on the Investment page (Define Agreement component).

If there is a surplus after the initial calculations, the process recalculates the employee funds as follows:

- Employees whose funds are at the individual allocation limit are frozen.
- For employees who are not frozen, the process recalculates funds, including the surplus amount.
- If there is surplus at the end of this recalculation, the steps are repeated until the surplus is zero or the number of iterations is ten.
- Sets the availability or payment date as follows:
  - For profit-sharing agreements, the availability date is determined by the unavailability duration defined in the agreement.

Payment date is set to the first day of the fourth month after the reference period end date plus unavailability duration. For example, if the reference period end date is December 31, 2001, and the unavailability duration is five years, the availability date is set to April 1, 2007.

- For worker's participation agreements, the payment date is set to the current date (payment is available at the end of the reference period).

Normally, payments for this type of agreement should be made within seven months of the reference period end date. The process issues a warning message if the payment date is after this seven-month deadline.

- Sets the payment status to *Entitled* for profit-sharing agreements, and to *Request Payment* for worker's participation agreements.

---

**Note:** The payment date is not a fixed date and can be overridden. For profit-sharing agreements, the payment date is changed for employees who request early release of funds. In addition, if you run the Process Interest and Payment process after the payment date calculated by the distribution process, the payment process sets the payment date to the current date.

---

## Related Links

[Computation Page](#)

## Prerequisites

The Extract Eligible Employees process runs only if these conditions are met:

- The agreement has a status of approved.
- A reference period is defined for the agreement.

Also, the process runs only after the reference period end date.

- Contract data exists for your employees, if you defined eligibility criteria.

The process uses contract dates to calculate seniority.

- Payroll information is set up.

The Extract Eligible Employees process imports employees' gross salary and total days worked from these sources:

- Global Payroll for France.

Accumulators track employees' salaries and number of days worked. These must be included in your process lists and the payroll for the whole reference period must be finalized.

- The record WP\_EXT\_PAYDATA, if an employee's payroll is not managed by Global Payroll for France.

You must ensure that this record is populated with employee payroll data.

- If you installed Global Payroll for France, you should also set it up as follows before running the eligibility process:
  - Include the element group PAR EG PARTICIPAT in the employees' eligibility group.
  - Include the section PAR SE PARTICIP in the process list.

Before running the Compute Global Fund process, ensure that any variables associated with the funding and limit formulas are populated with the correct values for the reference period.

For the Distribute Global Funds process to run correctly, ensure that these variables are populated with the correct values for the reference period:

- Variables associated with the individual allocation limit formula.
- The KFMS variable ID (for worker's participation agreements only).

This variable determines the total salary used in the distribution calculation based on employees' salaries.

---

**Note:** Ensure that your variables are defined with the correct scope for the agreement.

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## Related Links

[Understanding Profit-Sharing Agreements](#)

## Common Elements Used in This Section

<b>Field or Control</b>	<b>Description</b>
Agreement ID	Select the agreements that you want to process.
Reference Period	Select the reference periods that you want to process.
Re-Initialize?	<p>Select to override existing results. If you have previously run the process for the selected agreement and reference period, the system overrides the results, and any manual adjustments that you made will be lost.</p> <p>If you don't select this check box, and you have previously run the process for the agreement and reference period, the process doesn't run, and a warning is added to the log file.</p>

---

## Running the Process Interest and Payment Application Engine Process (HR\_WP\_PAYMT)

This section provides an overview of the Process Interest and Payment process, lists prerequisites, and discusses how to run the Process Interest and Payment process.

## Page Used to Run the Process Interest and Payment Application Engine Process (HR\_WP\_PAYMT)

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
<a href="#">Process Interest &amp; Payment Page</a>	RUNCTL_WP_PAYMT	Run the process for a selected agreement and reference period.

## Understanding the Process Interest and Payment Application Engine Process (HR\_WP\_PAYMT)

The Process Interest and Payment process is the final process that you run before you approve the reference period. The Process Interest and Payment process calculates deductions and interest, and processes payments. The process is run at least once a year, but is most likely run at intervals during the year to process employee fund releases. Fund status and interest amounts are more accurate if you run the process often throughout the year.

This process:

- Calculates deductions for employees' funds, and the net global fund after deductions have been deducted from the gross amounts.

Profit sharing and worker's participation amounts are liable to CSG and CRDS deductions. The rates of these deductions are stored in the variables KFCSG (for CSG) and KFCRDS (for CRDS).

- Calculates interest for employees whose profit-sharing agreements have an investment method of *Company Investment*.

Interest is calculated yearly on employees' funds during the period that funds are unavailable. The interest rate is defined in the agreement definition and employees can select to reinvest interest or receive interest payments.

---

**Note:** For worker's participation agreements, interest payments are paid only in exceptional circumstances when payment of funds is delayed. The Process Interest and Payment process does not calculate interest for this agreement type.

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- Calculates deductions on interest payments, and the net interest amount.

Interest payments are liable to CSG, CRDS, and Participation Sociale deductions. The rate of the Participation Sociale deduction is stored in the variable KFSOC.

- Sets the reference period status to *Computed*.
- Processes payments for profit-sharing funds with Company Investment as the investment method and worker's participation funds with Employee's Bank Account as the investment method.

Payments are processed only if the reference period is *Approved* and the fund status is *Request Payment*. The process changes the fund status to *Sent to payroll*.

- Receives information from Global Payroll for France or another payroll system about the status of payments previously sent, and updates fund status accordingly.

Payments that were processed successfully are assigned a status of *Paid*. If a payment was not processed, the process changes the fund status to *Error*.

Workflow occurs when the Process Interest and Payment process updates employees' fund status to:

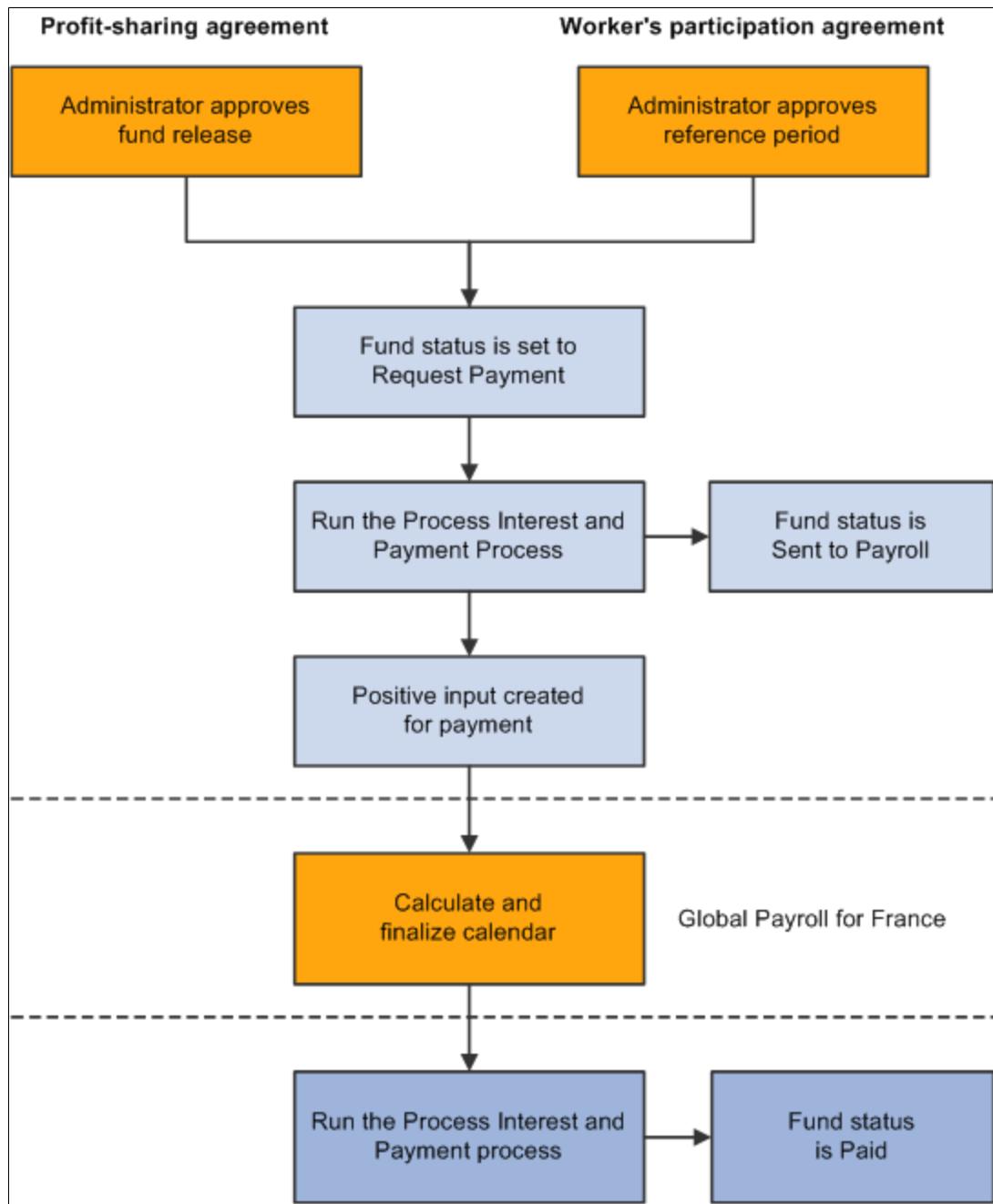
- *Available* or *Paid*, which triggers an email to employees informing them that their funds are available or paid.
- *Error*, which triggers an email to the compensation administrator who must investigate the error.

See [Setting Up Workflow for Profit Sharing](#).

## Integrating with Global Payroll for France

If you installed Global Payroll for France, you can use it to automatically process payments. The following diagram illustrates the payment processing with Global Payroll for France:

Payment processing with Global Payroll for France



## Integrating with Other Payroll Systems

To integrate the Manage French Profit Sharing business process with a payroll system other than Global Payroll for France, you must set up the integration points that enable payment information to be exchanged.

See Interactive Services Repository in the Implementation Guide section on My Oracle Support.

## Prerequisites

Before you run the Process Interest and Payment process for the first time for a reference period, you must run these processes:

- Extract Eligible Employees.
- Compute Global Fund.
- Distribute Global Funds.

## Process Interest & Payment Page

Use the Process Interest & Payment page (RUNCTL\_WP\_PAYMT) to run the process for a selected agreement and reference period.

Navigation:

**Compensation > Profit-Sharing FRA > Compute Profit-Sharing > Process Interest & Payment > Process Interest & Payment**

This example illustrates the fields and controls on the Process Interest & Payment page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Agreement ID	Select the agreement for which you want to run the process.
Reference Period	Select the reference period for which you want to run the process.

## Calendar List

Field or Control	Description
Pay Group	<p>The system populates this field with the pay groups for all eligible employees, based on the selected agreement and reference period. Check the list of pay groups, and add additional pay groups if there were changes since you ran the Extract Eligible Employees process. For example, you need to add pay groups if:</p> <ul style="list-style-type: none"> <li>• An employee changed pay group after you ran the Extract Eligible Employees process, and the new pay group isn't listed.</li> <li>• You manually added employees to the list of eligible employees after you ran the Extract Eligible Employees process, and their pay groups aren't listed.</li> </ul>
Calendar ID	Select the calendar for each pay group selected.

---

## Reviewing the Results of the Processes

When you run any of the profit sharing processes, you must check the message log generated by the process for errors or warning messages. Navigate to the message log from the run control pages as follows: **Process Monitor > Details > View Log/Trace**.

You can view the results of the process by using the Member Entitlement component, which lists the eligible employees and the results of the calculations.

### Related Links

[Understanding Member Information and Fund Release Requests](#)

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## Approving the Reference Period

When you have run all of the profit sharing processes and you are satisfied with the results, you must change the status of the reference period to *Approved*. Use the Reference Period component to change the status. Navigate to the component as follows: **Compensation > Profit-Sharing FRA > Review Reference Period > Reference Period**.

---

**Note:** Employees cannot view their profit-sharing funds until you change the reference period status to Approved.

### Related Links

[Setting Up Reference Periods](#)

# Reviewing and Reporting Employee Profit Sharing Information

## Understanding Member Information and Fund Release Requests

This section discusses how to:

- Process fund release requests.
- Process terminated employees.

The Member Entitlements component (WP\_PROFIT\_SHARING) is central to administration of the profit sharing business process. Compensation administrators use the component to review and adjust the results of the profit sharing processes, to process fund release requests submitted by employees, and to track fund transfers. The system populates the Member Entitlement component with results of the profit sharing processes as follows:

- After running the Extract Eligible Employees process, the component lists the employees who are eligible for profit sharing.

You can make the following changes before running the Compute Global Fund process:

- Add or remove employees from the eligible employees list.
- Modify some employee details such as the prorate factor and the employee salary.

- After running the Compute Global Fund and Distribute Global Funds processes, the component includes the employees' profit sharing amount.

You can adjust the employee's fund before running the Process Interest and Payment process.

- After running the Process Interest and Payment process, the component includes a breakdown of the deductions, gross, and net amounts for the employees' funds.

If interest is payable, this is also displayed for the employee.

### Processing Fund Release Requests

Profit-sharing agreements do not allow for automatic payment of funds, except where the fund amount is below a defined threshold (the variable KFIMMED stores this threshold value). If an employee's fund amount is above the threshold, the employee must submit a request for fund release. These requests are reviewed and approved by the compensation administrator.

Employees can submit fund release requests only after the reference period status is *Approved*.

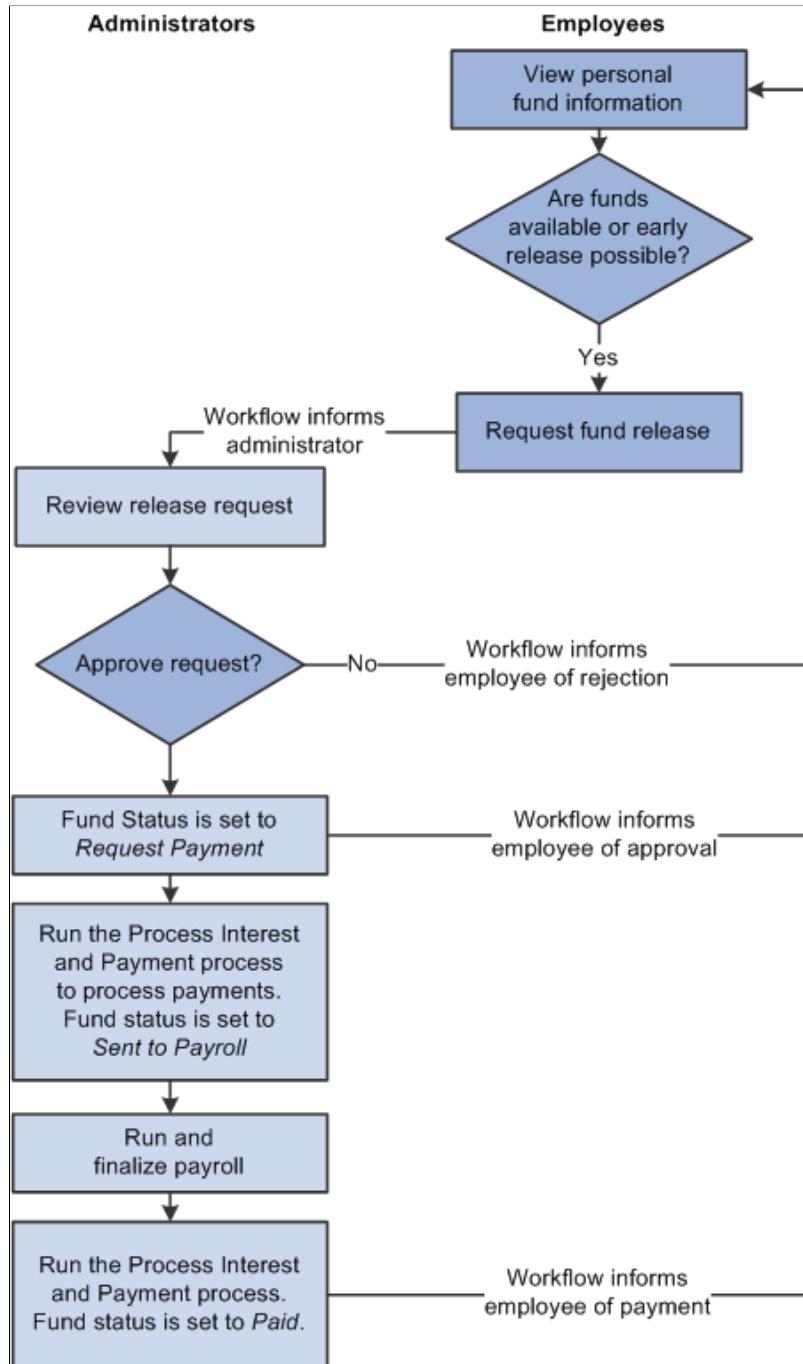
---

**Note:** Fund release requests only apply to agreements with *Company Investment* selected as the investment method. Fund releases for other types of investment are managed outside the system.

---

This illustration shows how fund releases are processed and when workflow is triggered:

Fund release process flow



## Processing Terminated Employees

When employees leave your organization, they can request a fund release, request fund transfer to the new company, or leave the fund unchanged.

Workflow keeps the compensation administrator informed of terminated employees as follows:

- When the workforce administrator inserts a termination action into an employee's job data this triggers workflow if the employee is eligible for profit sharing.

An email notifies the employee that he or she is entitled to funds from a profit-sharing agreement. A worklist entry takes employees to the Fund Release page where they submit a release request. Alternatively, employees can go to the Agreement Personalization page where they enter details of the financial organization to which funds should be transferred.

- Employees who want to transfer funds, enter the fund transfer information using the Agreement Personalization page.

This triggers an email to the compensation administrator (role HR Administrator FRA) with details of the employee ID, agreement ID, and period ID. The administrator organizes transfer of funds and records the transfer by updating the terminated employee's fund status to *Posted to Account*, using the Member Entitlement component.

## Related Links

[Understanding Employee Options](#)

# Reviewing Member Information

This section discusses how to review member details, view global fund calculation information and employee release details.

## Pages Used to Review Member Information

Page Name	Definition Name	Usage
<a href="#">Member Entitlements Page</a>	WP_PSHRG_MAIN_TBL	Review the results of the profit sharing processes for a selected agreement.
<a href="#">Global Fund Computation Level Page</a>	WP_PSHRG_EEDTL_SEC	View the global fund formula used to calculate the selected employee's global fund. This page is available for worker's participation agreements only.
<a href="#">Employee Release Detail Page</a>	WP_PSHRG_VSTDT_SEC	View full details of the employee's profit sharing amount, interest (if applicable), and fund release requests. This page gives a breakdown of the gross amount, deductions, and net amount. You can adjust calculated amounts, if required, and approve or reject the employee's fund release requests.

## Member Entitlements Page

Use the Member Entitlements page (WP\_PSHRG\_MAIN\_TBL) to review the results of the profit sharing processes for a selected agreement.

Navigation:

**Compensation > Profit-Sharing FRA > Manage Profit Sharing > Member Entitlements > Member Entitlements**

This example illustrates the fields and controls on the Member Entitlements page - Employee Distribution tab. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Member Entitlements' page with the 'Employee Distribution' tab selected. At the top, there are fields for 'Agreement ID' (KF2), 'Long Description' (Worker's participation agreement for group KFG001), 'Agreement Type' (Worker's Participation), and 'Agreement Status' (Approved). Below these are 'Agreement Start Date' (01/01/2001) and 'Agreement End Date' (01/01/2004). The main area is titled 'Eligible for Profit Sharing' and contains fields for 'Employee Name' and 'Employee ID', with a 'Search' button. A checkbox for 'Release Request' is checked. A table below shows the 'Attribute Definition' for 'Employee Distribution' with columns for Global Fund Lvl, Employee ID, Name, Emp Record, Period ID, Prorate Factor, Profit-Sharing Amount, and Release Request. The table shows one row for employee 1 with a fund amount of 0.000000 and a release request checkbox.

After you run the Extract Eligible Employees process for a selected agreement, the system populates this page with employees who are eligible for a share of the global fund. The Extract Eligible Employees process compiles this list using the eligibility criteria specified in the agreement.

You can add or remove employees from the list of eligible employees if necessary. However, if you add employees manually you must enter their salary information. If you add an employee after running the Distribute Global Funds process, you must rerun the process or enter the employee's fund amount.

<b>Field or Control</b>	<b>Description</b>
<b>Release Request</b>	Select this check box if you want to search for employees who have requested a fund release.
<b>Period ID</b>	Displays the reference period for which the employee is eligible.
 <b>Global Fund Lvl</b>	Click to view the computation level and funding formula that was used to calculate the global fund. This button is available for worker's participation agreements only.

<b>Field or Control</b>	<b>Description</b>
<b>Prorate Factor</b>	<p>Displays the proration factor calculated by the Extract Eligible Employees process by dividing the employee's working days by total working days in period. This factor is used later by the Distribute Global Funds process. One of the distribution methods for profit sharing is based on the number of days worked by the employee during the reference period.</p> <p>If you update the proration factor, the system displays a message warning you that the profit-sharing amount for the employee may not be consistent with the changed proration factor. If you have already run the Distribute Global Funds process, the employee's profit sharing is based on the previous value. In this case, you must manually update the profit-sharing amount or rerun the Distribute Global Funds process.</p>
<b>Profit-Sharing Amount</b>	<p>Displays the amount the employee will receive from profit sharing if you have run the Distribute Global Funds process for the reference period. To change the employee's fund amounts, click the <b>Employee Release Detail</b> button.</p>
<b>Release Request</b>	<p>This check box is automatically selected if the employee has submitted a fund release request. Once you approve or reject a request, the system deselects the check box. Click the <b>Employee Release Detail</b> button to view the request and approve or reject it.</p>
 <b>Release Detail</b>	<p>Click to check whether the employee has requested a fund release.</p>

## Employee Salaries

This example illustrates the fields and controls on the Member Entitlements page - Employee Salaries tab. You can find definitions for the fields and controls later on this page.

**Member Entitlements**

Agreement ID: KF2 KF2  
 Long Description: Worker's participation agreement for group KFG001  
 Agreement Type: Worker's Participation  
 Agreement Status: Approved  
 Agreement Start Date: 01/01/2001 Agreement End Date: 01/01/2004

**Eligible for Profit Sharing**

Employee Name:	<input type="text"/>						<input type="button" value="Search"/>
Employee ID:	<input type="text"/>						
<input type="checkbox"/> Release Request	Period ID:	No Items Found					

**Attribute Definition**

<input type="button" value="Employee Distribution"/>	<input type="button" value="Employee Salaries"/>						
Global Fund Lvl	*Employee ID	Name	Empl Record	*Period ID	View	Employee Salary (Max applied)	Global Fund
<input type="checkbox"/> 1		<input type="text"/>		<input type="text"/>			0.00

<b>Field or Control</b>	<b>Description</b>
<b>Employee Salary</b>	Displays the employee's salary. This information is imported from PeopleSoft Global Payroll for France or from another payroll system when you run the Extract Eligible Employees process.
<b>(Max applied) (maximum applied)</b>	Displays the employee's salary, after the maximum limit is applied. This value is calculated by the Extract Eligible Employees process using the Individual Salary Limit Formula specified in the agreement.
<b>Global Fund</b>	Displays the global fund calculated by the Compute Global Fund process.

## Global Fund Computation Level Page

Use the Global Fund Computation Level page (WP\_PSHRG\_EEDTL\_SEC) to view the global fund formula used to calculate the selected employee's global fund.

This page is available for worker's participation agreements only.

Navigation:

Click the **Global Fund Lvl** button on the Member Entitlements page.

This example illustrates the fields and controls on the Global Fund Computation Level page. You can find definitions for the fields and controls later on this page.

Global Fund Computation Level

Agreement ID KF2	Worker's participation agreement for group KFG001
Employee ID	
Empl Record 0	
Reference Period	
Computation Level	
<input type="radio"/> Agreement Level <input type="radio"/> Establishment Level <input checked="" type="radio"/> Work Unit Level	
Global Fund Formula	
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>	
<a href="#">View Agreement</a> <a href="#">Return</a>	

<b>Field or Control</b>	<b>Description</b>
<b>Reference Period</b>	Displays the period ID shown on the Member Entitlements page.
<b>View Agreement</b>	Click this link to view the agreement definition pages.

## Computation Level

Worker's participation agreements can have multiple formulas for calculating global funds. Formulas are defined for all employees associated with the agreement, for employees in specific establishments, or employees in specific work units. This group box displays the formula that applies to the selected employee.

<b>Field or Control</b>	<b>Description</b>
<b>Global Fund Formula</b>	Displays the funding formula used to calculate the employee's global fund. The funding formulas are defined on the Computation page (Define Agreement component).

## Related Links

[Computation Page](#)

## Employee Release Detail Page

Use the Employee Release Detail page (WP\_PSHRG\_VSTDT\_SEC) to view full details of the employee's profit sharing amount, interest (if applicable), and fund release requests.

This page gives a breakdown of the gross amount, deductions, and net amount. You can adjust calculated amounts, if required, and approve or reject the employee's fund release requests.

Navigation:

Click the **Release Detail** button on the Member Entitlements page.

This example illustrates the fields and controls on the Employee Release Detail page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Employee Release Detail' window. At the top, it displays 'Agreement ID KF2' and 'Worker's participation agreement for group KFG001'. Below this, there are two main sections: 'Profit-Sharing Details' and 'Interest Payment Details'. The 'Profit-Sharing Details' section contains a table with columns: Nbr, Profit-Sharing Gross Amount, Profit-Sharing Deductions, Profit-Sharing Net Amount, Availability/Payment Date, and \*Fund Status. The 'Interest Payment Details' section contains a table with columns: \*From Date, \*Thru Date, Interest Gross Amount, Deductions on Interests, Interest Net Amount, Payment Date, \*Status, and \*Option. At the bottom of the window are buttons for 'OK', 'Cancel', and 'Refresh'.

## Release Request

This group box appears if the selected employee has submitted a request to release funds. It is relevant for profit-sharing agreements only.

Field or Control	Description
<b>Release Request</b>	<p>Indicates the type of fund release requested. Values are:</p> <p><i>Amount:</i> Employee requested release of a specific amount shown in the <b>Release Amount</b> field.</p> <p><i>Total:</i> Employee requested release of the entire fund. The total is shown in the <b>Release Amount</b> field.</p>
<b>Release Date</b>	Displays the date when the employee submitted the fund release request.
<b>Event</b>	Displays the event that the employee selected for the fund request and the date on which the event occurred is shown in the <b>Event Date</b> field.
<b>Request Status</b>	Displays the status of the fund release request: <i>New</i> for a new request, <i>Approved</i> or <i>Rejected</i> .
<b>Approve</b>	Click to approve the request. This triggers workflow to notify the employee that the request is approved and changes the fund status to <i>Request Payment</i> .
<b>Reject</b>	Click to reject the request. This triggers workflow to notify the employee that the request was rejected.

## Profit Sharing Details

<b>Field or Control</b>	<b>Description</b>
<b>Profit-Sharing Gross Amount</b>	Displays the employee's fund calculated by the Distribute Global Funds process.
<b>Profit-Sharing Deductions</b>	Displays the deductions on the employee's fund that are calculated by the Process Interest and Payment process.
<b>Profit-Sharing Net Amount</b>	Displays the amount payable to the employee after deductions are made.
<b>Availability/Payment Date</b>	<p>Displays the date that the employee is due to receive payment or the date on which funds become available as follows:</p> <ul style="list-style-type: none"> <li>• If the <b>Fund Status</b> is <i>Entitled</i>, this field shows the date on which funds are available to employees. Employees can request fund release without conditions from this date.</li> <li>• If the <b>Fund Status</b> is <i>Request Payment</i>, <i>Sent to Payroll</i>, or <i>Paid</i> this field shows the payment date.</li> </ul> <p>The date is defined by the Distribute Global Funds process and the Process Interest and Payment process. You can override it if <b>Fund Status</b> is one of these values: <i>Entitled</i>, <i>Available</i>, <i>Request Payment</i>, <i>Error</i>, or <i>Canceled</i>.</p>

<b>Field or Control</b>	<b>Description</b>
<b>Fund Status</b>	<p>Displays the fund status that the Distribute Global Funds process and the Process Interest and Payment process have assigned, but you can change the status as required:</p> <p><i>Entitled:</i> Indicates that the employee's fund has been calculated but the money is unavailable. This status applies to profit-sharing agreement types only.</p> <p><i>Available:</i> Indicates that the employee's fund is available. For worker's participation agreements, the fund is available as soon as it is calculated. For profit-sharing agreements, funds are available after the end of the unavailability period defined for the agreement.</p> <p><i>Canceled:</i> Cancels the profit-sharing amount. Use this status when you find an error in an employee's fund after running the Distribute Global Funds process. To correct such a problem, you cannot run the process again or delete the employee data. Instead, set the fund status to <i>Canceled</i> and insert a new row for the employee with the correct amount. Using the <i>Canceled</i> status you can track the cancellation and the manual adjustments.</p> <p><i>Sent to Payroll:</i> Indicates that the Process Interest and Payment process has run and the profit-sharing amount has been sent to Global Payroll for France.</p> <p><i>Posted to Account:</i> Indicates that funds have been transferred to an external organization. The financial organization is defined in the Define Agreement component. Terminated employees can override the default organization for transfer of their entitlement to their new company fund.</p> <p><i>Paid:</i> Indicates that the payment has been processed by your payroll system. If you have Global Payroll for France installed and you're using Company Investment method, the Process Interest and Payment process sets the status to <i>Paid</i> when the payment is processed. If you have any other investment method, you must set the status to <i>Paid</i> manually when the payment is processed.</p> <p><i>Error:</i> Indicates that the Process Interest and Payment process could not process the payment.</p> <p><i>Request Payment:</i> Indicates that the funds are waiting to be processed.</p> <p><i>Transfer to Account:</i> Indicates that funds are due to be transferred to an external organization. Once the transfer is</p>

<b>Field or Control</b>	<b>Description</b>
	complete, you need to set the status to <i>Posted to Account</i> to track the funds.

## Interest Payment Details

This group box appears for profit-sharing agreements with the *Company Investment* method selected. These amounts are calculated by the Process Interest and Payment process.

<b>Field or Control</b>	<b>Description</b>
<b>From Date and Thru Date</b>	Defines the period for which interest has been calculated. Interest is calculated yearly during the period when funds are unavailable.
<b>Interest Gross Amount</b>	The interest due on the global fund before deductions are taken.
<b>Deductions on Interest</b>	The deductions on the interest.
<b>Interest Net Amount</b>	The interest payable to the employee after deductions are made.
<b>Payment/Reinvestment Date</b>	Depending on the interest status, this field shows one of three dates: the date that the employee is due to receive the interest payment, the date on which the payment was made, or the date on which the interest is reinvested.

<b>Field or Control</b>	<b>Description</b>
<b>Status</b>	<p>Interest status. Values are:</p> <p><i>Canceled</i>: Cancels the interest. Use this status when you find an error in an employee's interest after running the Distribute Global Funds process. To correct such a problem, you cannot run the process again or delete the employee data. Instead, set the interest status to <i>Canceled</i> and insert a new row for the employee with the correct amount.</p> <p><i>Entitled</i>: Indicates that the interest has been calculated and is available.</p> <p><i>Reinvested</i>: Indicates that interest has been added to the global funds and isn't paid immediately to the employee.</p> <p><i>Manual</i>: Use this status when you enter the interest amount manually.</p> <p><i>Sent to Payroll</i>: Indicates that the Process Interest and Payment process has run and the interest payment has been sent to Global Payroll for France.</p> <p><i>Paid</i>: Indicates that the interest payment has been processed by your payroll system. The Process Interest and Payment process sets the status to <i>Paid</i> when the interest payment is processed.</p> <p><i>Error</i>: Indicates that the Process Interest and Payment process could not process the interest payment.</p>
<b>Option</b>	<p>Displays the interest reinvestment method selected. This is either the default method for the agreement or the method selected by the employee. You can override the value.</p>

## Reporting Profit Sharing

This section discusses how to run profit sharing reports.

Compensation administrators are responsible for providing all eligible employees with details of their profit sharing amount when these are calculated, or when an employee leaves the organization.

The Individual Profit Sharing report provides all the necessary information for individual employees. This is the same information that the employee can access online using the Request Fund Release option.

PeopleSoft also provides the Agreement Profit Sharing report for administrators. This report lists all the employees that are eligible for a selected agreement, or all eligible employees with the same fund status. This is a useful way to generate a list of employees who have requested a fund release, employees who are in error, or employees whose funds are to be transferred. The Agreement Profit Sharing report

includes the status of the employees, gross and net profit sharing amount, deductions and investment methods.

You can only run these reports if the status of the reference period is set to *Computed*, which means that the Compute Global Fund and the Distribute Global Funds processes have been run.

## Pages Used to Run the Profit Sharing Reports

Page Name	Definition Name	Usage
Individual Report Page	RUNCTL_WP_IND_RPT	Use this page to run the Individual Profit Sharing Report (WP0001FR). This report is delivered each year to employees to inform them of their entitlements.
<u><a href="#">Agreement Report Page</a></u>	RUNCTL_WP_AGRT_RPT	Use this page to run the Agreement Profit Sharing Report (WP0002FR).

### Related Links

[Viewing Personal Entitlements and Requesting Fund Release](#)

## Agreement Report Page

Use the Agreement Report page (RUNCTL\_WP\_AGRT\_RPT) to use this page to run the Agreement Profit Sharing Report (WP0002FR).

Navigation:

**Compensation > Profit-Sharing FRA > Manage Profit Sharing > Agreement Report > Agreement Report**

This example illustrates the fields and controls on the Agreement Report page. You can find definitions for the fields and controls later on this page.

Field or Control	Description
Agreement ID	Select the agreement on which you want to report.
Reference ID	Select the reference period for the report.

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Fund Status</b>	Select the status from the available values if you want to run the report for funds of a certain status. Otherwise, leave this field blank to include funds of all statuses.
<b>Employee ID</b>	Select the employee you want to report on or leave blank to run the report for all eligible employees.

## Chapter 6

# Using Profit Sharing Employee Options

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## Understanding Employee Options

Employees access and update agreement information online in two ways:

- Using the Review Agreement, Agreement Personalization, and Personal Entitlement components available in the Manage French Profit Sharing business process in HR.
- Using self-service transactions provided with PeopleSoft eCompensation.

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**Note:** Only employees can access their own profit-sharing information by using the employees options. Therefore, a compensation administrator using these options would only see his or her profit-sharing information.

---

These topics describe these two employee options available in the Manage French Profit Sharing business process:

- Agreement Personalization.

Employees use this component to view agreement information and change agreement settings. This option is only available when the agreement has an *Approved* status.

- Personal Entitlement.

Employees use this component to view their fund information once the funds have been calculated and the reference period status is *Approved*. For profit-sharing agreements, employees also use the component to request release of part or all of the funds. For worker's participation agreements, funds are available at the end of the reference period and not subject to a period of unavailability.

---

**Note:** The Review Agreement component gives employees a display-only view of the agreement definition. The pages are the same as those used by the administrator for setting up the agreement.

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### Related Links

“Understanding the Profit-Sharing Self-Service Transactions” (PeopleSoft eCompensation)  
[Agreement Page](#)

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## Personalizing Agreements

This section discusses how to view reference period information, personalize investment information and interest information.

## Pages Used to Personalize Agreements

<b>Page Name</b>	<b>Definition Name</b>	<b>Usage</b>
Inquire and Customize Page	WP_AGRT_CUST_TBL	View details of the agreement information that is defined on the Define Agreement - Agreement page. Employees can also view the agreement document from this page.
<u>Global Fund Page</u>	WP_PERIOD_CUST_TBL	View the reference periods defined for the agreement and the status of each period. Employees can also view the global funding formula defined for each reference period.
Formula View Page	WP_FORMULA_VW2_SEC	View a description of the formula that calculates the global fund amount. This formula is specified in the Funding Formula field on the Define Agreement - Computation page. To make it easier for employees to understand, the system displays the comments specified for the formula and not the actual formula. These comments are entered on the Formula Comments page.
<u>Investment Page</u>	WP_INVEST_CUST_TBL	View the investment methods defined for the agreement. If multiple investment methods are defined, employees can select a method for their share of the global fund.
Investment Method Details Page	WP_AGRT_INVES1_SEC	View the details of an investment method. The fields on this page vary according to the investment method selected.
<u>Interest Page</u>	WP_INTRST_CUST_TBL	View interest information calculated by the Process Interest and Payment process and select whether to reinvest the interest or receive it. This page is available for profit-sharing agreements with the Company Investment method selected only. Interest is not calculated for other types of agreement.

## Global Fund Page

Use the Global Fund page (WP\_PERIOD\_CUST\_TBL) to view the reference periods defined for the agreement and the status of each period.

Employees can also view the global funding formula defined for each reference period.

Navigation:

**Compensation > Profit-Sharing FRA > Manage Profit Sharing > Agreement Personalization > Global Fund**

This page lists the reference periods that were defined for the agreement using the Reference Period page. Employees can't update any fields on the page.

<b>Field or Control</b>	<b>Description</b>
<b>Global Fund</b>	<p>Displays the global fund amount, which is calculated by the Compute Global Fund and Distribute Global Funds process, using the formulas and distribution methods defined on the Define Agreement pages.</p> <p>The system populates this field only when the reference period status is <i>Approved</i>.</p>
<b>View Formula</b>	<p>Click to view the formula for calculating the global fund. The system displays the comments specified for the formula on the Formula Comments page.</p>

## Investment Page

Use the Investment page (WP\_INVEST\_CUST\_TBL) to view the investment methods defined for the agreement.

If multiple investment methods are defined, employees can select a method for their share of the global fund.

Navigation:

**Compensation > Profit-Sharing FRA > Manage Profit Sharing > Agreement Personalization > Investment**

### Agreement Investments

This scroll area displays the investment methods that were selected for the agreement on the Investment page (Define Agreement component).

<b>Field or Control</b>	<b>Description</b>
<b>Details</b>	<p>Click to view details of the <b>Investment Method</b>. The information displayed varies according to the investment type.</p>
<b>Default</b>	<p>Indicates the default investment method. This is how an employee's funds are invested, unless the employee selects another investment method.</p>

## Customize Investment

Employees use this scroll area to override the default investment method for their fund for a selected reference period.

Field or Control	Description
<b>Investment Method</b>	<p>Select from any of the alternative investment methods that are defined for the agreement. Employees can't change the investment method after the first payment is made or after the personalization date defined for the reference period.</p> <p>Employees who are leaving the organization, select <i>Transfer to new comp/fin orga.</i> to identify the organization to which the funds are transferred. The <b>Details</b> button appears when the employee selects this investment method.</p>
<b>Details</b>	<p>Click this button to display the investment details page. Employees who are leaving the organization use this page to enter the name and address of the new company to which funds will be transferred.</p>

## Related Links

[Setting Up Reference Periods](#)

[Understanding Member Information and Fund Release Requests](#)

## Interest Page

Use the Interest page (WP\_INTRST\_CUST\_TBL) to view interest information calculated by the Process Interest and Payment process and select whether to reinvest the interest or receive it.

This page is available for profit-sharing agreements with the Company Investment method selected only. Interest is not calculated for other types of agreement.

Navigation:

**Compensation > Profit-Sharing FRA > Manage Profit Sharing > Agreement Personalization > Interest**

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**Note:** This page is displayed for profit-sharing agreement types with Company Investment selected as the investment method only.

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Field or Control	Description
<b>Agreement Re-Investment Option</b>	<p>Displays the interest re-investment option selected on the Investment page (Define Agreement component). This is how the system handles interest payments, unless the employee changes the default.</p>

## Customize Re-Investment Option

Employees use this scroll area to override the re-investment option defined for the agreement for each reference period. Employees cannot change the re-investment option once interest has been paid for a given reference period, or after the personalization date defined for the reference period.

### Related Links

[Investment Page](#)

## Viewing Personal Entitlements and Requesting Fund Release

This section lists prerequisites and discusses how to view profit-sharing amount, submit a fund release request and view interest information.

For worker's participation agreements, employees don't need to request fund release because funds are automatically paid as soon as they are available.

For profit-sharing agreements, employees can normally only release funds after the end of the unavailability period. However, in certain situations, employees can request early release of funds by specifying the reason for the early release. If you have enabled workflow, when employees submit fund release requests workflow triggers an email to the compensation administrator to inform the administrator that a new request is waiting for approval.

## Pages Used to Request Fund Release

Page Name	Definition Name	Usage
<a href="#">Profit-Sharing Inquire Page</a>	WP_FUND_RLS_TBL	Employees use this page to view details of their funds, including gross and net amounts, payment status, and information about the average fund amounts.
<a href="#">Fund Request Details Page</a>	WP_FUND_EVNT_SEC	Request release of profit-sharing amount. This page is only available if employees are associated with profit-sharing agreements. For worker's participation agreements, funds are available at the end of the reference period.
<a href="#">Interest Inquire Page</a>	WP_FUND_INTRST_TBL	View details of interest payments calculated by the Process Interest and Payment process. This page is only available if employees are associated with profit-sharing agreements with <i>Company Investment</i> selected as the investment method. Interest is not paid for worker's participation agreements.

## Related Links

[Investment Page](#)

## Prerequisites

Employees can only view their funds when the following criteria are met:

- The administrator has run the profit sharing processes for the reference period.
- The reference period status is *Approved*.

## Profit-Sharing Inquire Page

Use the Profit-Sharing Inquire page (WP\_FUND\_RLS\_TBL) to employees use this page to view details of their funds, including gross and net amounts, payment status, and information about the average fund amounts.

Navigation:

**Compensation > Profit-Sharing FRA > Manage Profit Sharing > Personal Entitlements > Profit-Sharing Inquire**

This page displays the employee's profit sharing amount as calculated by the Compute Global Fund and Distribute Global Funds processes.

<b>Field or Control</b>	<b>Description</b>
<b>Request</b>	Click to access the fund release page where the employee specifies the reason for fund release and the amount to be released.

## Profit-Sharing Details

<b>Field or Control</b>	<b>Description</b>
<b>Profit-Sharing Gross Amount</b>	Displays the employee's profit-sharing amount calculated by the Distribute Global Funds process.
<b>Profit-Sharing Deductions</b>	Displays the deductions due on the profit sharing amount.
<b>Profit-Sharing Net Amount</b>	Displays the amount payable after deductions are made.

<b>Field or Control</b>	<b>Description</b>
<b>Status</b>	<p>Displays the status of the employee's fund:</p> <p><i>Entitled:</i> Indicates that the profit share amount has been calculated but the money is unavailable. This status applies to profit-sharing agreement types only.</p> <p><i>Available:</i> Indicates that the profit share amount can be released. For worker's participation agreements, the fund is available as soon as it is calculated. For profit-sharing agreements, funds are available after the end of the unavailability period defined for the agreement.</p> <p><i>Canceled:</i> Indicates that the compensation administrator canceled the profit-sharing amount.</p> <p><i>Sent to Payroll:</i> Indicates that the Process Interest and Payment process has run and the profit-sharing amount has been sent to PeopleSoft Global Payroll for France.</p> <p><i>Posted to Account:</i> Indicates that the funds have been transferred to an external financial organization.</p> <p><i>Paid:</i> Indicates that the payment has been processed by your payroll system.</p> <p><i>Error:</i> Indicates that the Process Interest and Payment process could not process the payment.</p> <p><i>Request Payment:</i> Indicates that the employee submitted a fund release request. The compensation administrator must approve this request before the payment is processed.</p> <p><i>Transfer to Account:</i> Indicates that the funds are waiting for transfer to an external financial organization.</p>
<b>Availability/Payment Date</b>	Displays the date that the employee is due to receive payment or the date on which the payment was made. The payment date is calculated by the Process Interest and Payment process.
<b>Global Fund Amount</b>	Displays the total fund for all eligible employees.
<b>Average Total Gross Amount</b>	Displays the average gross amount for all employees in the agreement.
<b>Total Gross Amount</b>	Displays the total of the amounts in the <b>Profit Sharing Gross Amount</b> column.

<b>Field or Control</b>	<b>Description</b>
<b>Total Net Amount</b>	Displays the total of the amounts in the <b>Profit Sharing Net Amount</b> column.
<b>Agreement Personalization</b>	Click to display the Agreement Personalization page where the employee can view and personalize agreement details.

## Fund Request Details Page

Use the Fund Request Details page (WP\_FUND\_EVNT\_SEC) to request release of profit-sharing amount.

This page is only available if employees are associated with profit-sharing agreements. For worker's participation agreements, funds are available at the end of the reference period.

Navigation:

Click the **Request** button on the Profit-Sharing Inquire page.

Employees use this page to request fund release in the following situations:

- Before the end of the unavailability period.

Employees can request early release of funds in certain situations. They use this page to specify the event that enables them to request fund release.

- After the end of the unavailability period.

Normally profit-sharing funds are unavailable for a defined period that is set up in the agreement. At the end of this period, the fund status is changed to *Available* and employees can request release.

Requests are submitted to the compensation administrator for approval. Employees receive an email when the administrator approves or rejects the request.

<b>Field or Control</b>	<b>Description</b>
<b>Available/Entitled Amount</b>	<p>Displays the maximum amount that the employee can request. This does not include any interest payments to which the employee may be entitled.</p> <p><b>Note:</b> A total release includes any interest payments to which the employee is entitled.</p>

## Trigger Event Information

Field or Control	Description
<b>Event Date and Release Event</b>	Select the event that enables the release of funds and enter the date in <b>Event Date</b> . for employees who are requesting early fund release. Employees who are leaving the organization, select <i>Termination</i> . If the funds are available, employees select <i>Available</i> .

## Release Request

Field or Control	Description
<b>Total Release</b>	Select this option if employees want to release the whole fund for the reference period. If the employee is entitled to an interest payment, this is included if the employee requests a total release.
<b>Amount</b>	Select this option to specify the amount the employees want released. They enter the amount and currency in the fields provided.

## Interest Inquire Page

Use the Interest Inquire page (WP\_FUND\_INTRST\_TBL) to view details of interest payments calculated by the Process Interest and Payment process.

This page is only available if employees are associated with profit-sharing agreements with Company Investment selected as the investment method. Interest is not paid for worker's participation agreements.

Navigation:

**Compensation > Profit-Sharing FRA > Manage Profit Sharing > Personal Entitlements > Interest Inquire**

This page appears only if the Company Investment method was selected for the agreement.

## Interest Details

Field or Control	Description
<b>From Date and Thru Date</b>	Displays the dates defining the period for which interest has been calculated. Interest is calculated yearly during the period when funds are unavailable.

<b>Field or Control</b>	<b>Description</b>
<b>Interest Gross Amount</b>	Displays the interest calculated by the Process Interest and Payment process.
<b>Deductions on Interests</b>	Displays the deductions due on the interest payment.
<b>Interest Net Amount</b>	Displays the interest payable after deductions are made.
<b>Status</b>	<p>Displays interest status. Values are:</p> <p><i>Canceled:</i> Cancels the interest. Compensation administrators use this status if there is an error in an employee's interest after running the Distribute Global Funds process.</p> <p><i>Entitled:</i> Indicates that the interest has been calculated and is available.</p> <p><i>Reinvested:</i> Indicates that interest has been added to the global funds and isn't paid immediately to the employee.</p> <p><i>Manual:</i> Indicates that the interest amount was entered manually by the administrator.</p> <p><i>Sent to Payroll:</i> Indicates that the Process Interest and Payment process has run and the interest payment has been sent to your payroll system.</p> <p><i>Paid:</i> Indicates that the interest payment has been processed by your payroll system. If you have Global Payroll for France installed and you're using the Company Investment method, the Process Interest and Payment process sets the status to <i>Paid</i> when the interest payment is processed.</p> <p><i>Error:</i> Indicates that the Process Interest and Payment process could not process the interest payment.</p>
<b>Payment/Re-Investment Date</b>	Displays the date that the employee is due to receive the interest payment or the date on which the interest is reinvested.
<b>Option</b>	<p>Displays the interest re-investment method selected. This is either the default for the agreement or the re-investment method that the employee selected on the Interest page (Agreement Personalization component). Values are:</p> <p><i>Immediate:</i> Interest is paid at the end of the calculation period.</p> <p><i>Re-invest:</i> Interest is added to the global fund.</p>

<b><i>Field or Control</i></b>	<b><i>Description</i></b>
<b>Total Net Amount</b>	Displays the total net amount for all reference periods, as shown on the Profit-Sharing Inquire page.
<b>Total Interest Gross Amount</b>	Displays the total of the amounts in the <b>Interest Gross Amount</b> column.
<b>Total Interest Net Amount</b>	Displays the total of the amounts in the <b>Interest Net Amount</b> column.

