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PeopleSoft HR 9.1 PeopleBook: Report Total Compensation

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PeopleSoft HR 9.1 PeopleBook: Report Total Compensation
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Contents

PeopleSoft HR Report Total Compensation Preface

This preface discusses:

- PeopleSoft Products.

- PeopleSoft HCM application fundamentals.

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

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft HR Report Total Compensation.

PeopleSoft HCM Application Fundamentals

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

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HCM product line. No matter which PeopleSoft HCM products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM Application Fundamentals Preface"

PeopleBooks and the PeopleSoft Online Library

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

- Understanding the PeopleSoft online library and related documentation.

- How to send PeopleSoft documentation comments and suggestions to Oracle.

- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.

- Understanding PeopleBook structure.

- Typographical conventions and visual cues used in PeopleBooks.

- ISO country codes and currency codes.

- PeopleBooks that are common across multiple applications.

- Common elements used in PeopleBooks.

- Navigating the PeopleBooks interface and searching the PeopleSoft online library.

- Displaying and printing screen shots and graphics in PeopleBooks.

- How to manage the locally installed PeopleSoft online library, including web site folders.

- Understanding documentation integration and how to integrate customized documentation into the library.

- Application abbreviations found in application fields.

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

Chapter 1

Getting Started with Total Compensation

This chapter provides an overview of Total Compensation and discusses:

- Total Compensation business processes.

- Total Compensation integrations.

- Total Compensation implementation.

Total Compensation Overview

The Total Compensation business process in PeopleSoft HCM enables you to track, report, and analyze the collective cost of compensating your workers. Using this business process, you can view and analyze compensation information in a variety of ways.

Total Compensation gathers information from several components of PeopleSoft HCM:

- PeopleSoft Payroll for North America.

- PeopleSoft Benefits Administration.

- PeopleSoft HR.

Total Compensation Business Processes

The Total Compensation business process consists of these lower level business processes:

- Report on Total Compensation.

- Inquire on Total Compensation.

- Retrieve HR Total Compensation Data.

- Analyze Total Compensation Data.

We cover these functions in the business process chapters in this PeopleBook.

Total Compensation Business Processes

The Total Compensation business process consists of these lower level business processes:

- Retrieving Total Compensation data.

  Total Compensation retrieves HR total compensation data and compiles it so that you can you to inquire on it, report it, and analyze it.

- Reporting on total compensation.

  You can create these reports of total compensation:

  - Employee Benefits statement: A listing of all compensation for each individual, designed for distribution to workers.

  - Employee Compensation report: Detailed information about each compensation type for each individual within a group that you specify.

  - Group Compensation report: Aggregated information for each individual within a group that you specify.

- Inquiring on total compensation.

  Inquiries are on-screen displays of the total compensation, human resources, and payroll amounts for one worker or for a group of workers.

- Analyzing total compensation data.

  Analyze total compensation information using Microsoft Excel or OLAP Analysis models.

Total Compensation Integrations

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

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

Total Compensation integrates with these HCM applications: Payroll for North America and Benefits Administration.

We cover integration considerations in this PeopleBook.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Getting Started with PeopleSoft HCM"

Total Compensation Implementation

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

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

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

Component	Component Interface	References
TC_COMP_DEFN	CI_TC_COMP_DEFN	See Chapter 3, "Setting Up the Total Compensation Reporting Structure," Defining Compensation IDs and Mapping Extract Data, page 16.
TC_CATEGORY	CI_TC_CATEGORY	See Chapter 3, "Setting Up the Total Compensation Reporting Structure," Defining Roll-up Categories, page 12.

Other Sources of Information

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

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM Application Fundamentals Preface"

PeopleTools 8.52: Setup Manager PeopleBook

Chapter 2

Understanding Total Compensation

This chapter provides overviews of the Total Compensation output, the Compensation Tree, compensation IDs (comp IDs) and their sources, and time periods, and discusses how to prevent double accounting.

Total Compensation Output

Total Compensation enables you to generate the following output:

- *Reports*

    - Employee Benefits statement:A listing of all compensation for each worker, designed for distribution to workers.

    - Employee Compensation report: Detailed information about each compensation type for each individual within a group that you specify.

    - Group Compensation report: Aggregated information for each worker within a group that you specify.

- *Inquiries*

    Inquiries are on-screen displays of the total compensation, human resources, and payroll amounts for one worker or for a group of workers.

- *Spreadsheet*

    Retrieves total compensation data and display it in Microsoft Excel.

- *OLAP Analysis Models (Cubes)*

    PeopleSoft HCM integrates with online analytical processing (OLAP) tools, so that you can analyze these cubes.

    The OLAP structure is formed in a cube. With these cubes, you view and store multiple models of compensation for your organization and process cubes to analyze data.

    This document assumes you are familiar with OLAP concepts and terminology.

Total Compensation Process

This illustration provides an overview of the Total Compensation process and how the system integrates with PeopleSoft Payroll for North America, Benefits and HR:
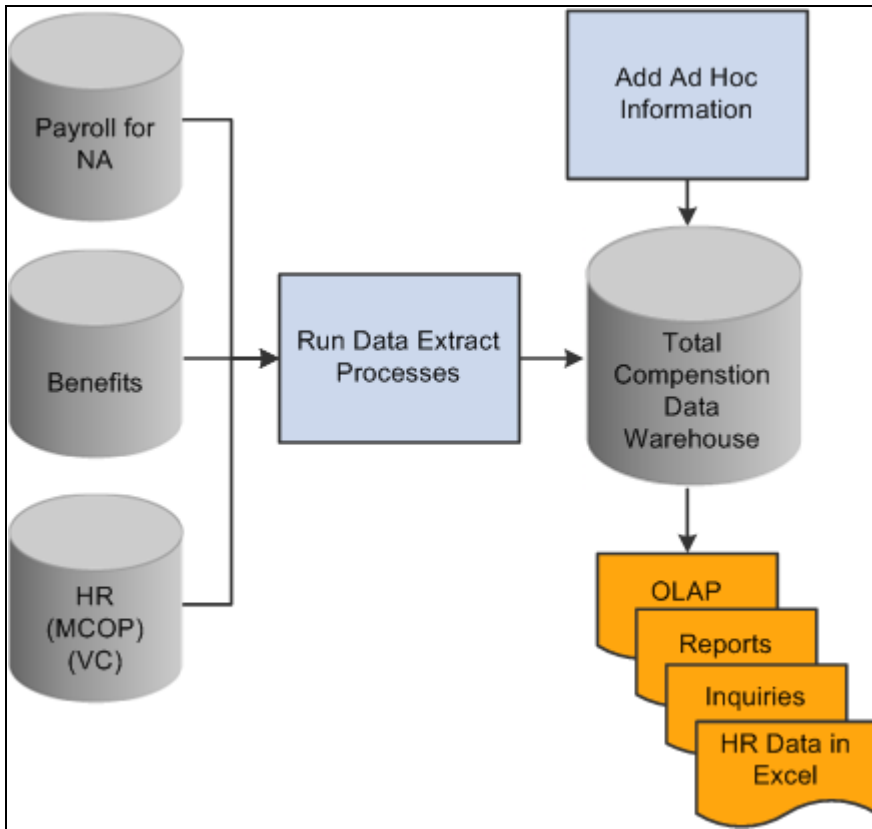
Total Compensation process showing integrations with PeopleSoft Payroll for North America, Benefits and HR

Processing Sequence

The reporting structure that you set up determines how the reporting results appear. PeopleSoft provides predefined values for most of the reporting structure components. You might want to alter a few predefined attributes.

This flowchart illustrates how the steps work together to define results. You generally set up a reporting structure once and change it occasionally. You perform the other steps as needed.
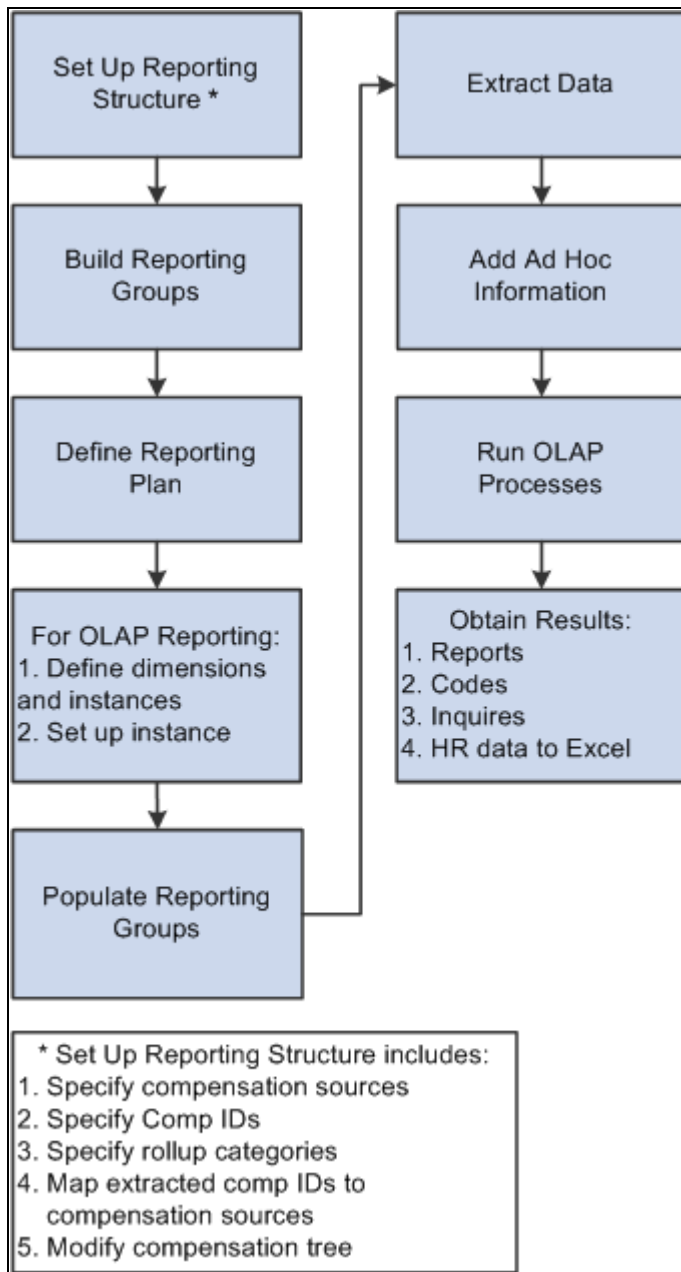
Processing sequence that illustrates how the reporting structure that you set determines how the reporting results appear

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Compensation Trees

The structure of the Compensation Tree determines how the data warehouse stores the information that it collects. PeopleSoft provides a Compensation Tree that you alter as needed. Change the tree structure before you begin data collection.

For the Total Compensation business process, you can define the leaves and nodes of the tree *before* you define the tree. The trees in the business process use a dedicated tree structure. The tree nodes are called *rollup categories,* and the tree leaves are called *compensation IDs* (comp IDs). You define both of these when you build the tree.

Compensation Tree structure with leaves and nodes, representing compensation IDs and rollup categories respectively

Note. All predefined Total Compensation components, such as trees, queries, and cube dimensions, begin with *TC_* (for example, the dimension *TC_Company).*

Compensation IDs and Their Sources

Compensation IDs are the elementary pieces of the reporting process. Each comp ID represents a figure reported in the results. Comp IDs are the leaves on the Compensation Tree. By using comp IDs, Total Compensation can gather data in the same way for any type of result.

PeopleSoft HR supplies predefined comp IDs; you add comp IDs mostly for ad hoc awards.

Comp IDs are the elements of compensation, such as components of pay, variable compensation awards, and benefit amounts. Each comp ID is mapped to the appropriate compensation source so that the extraction processes can retrieve the data and place it in the warehouse. You can have as many comp IDs as you need, and each comp ID can have one or more sources.

The most extreme case is to have just one comp ID containing components from all the possible sources. You would map that comp ID to each source so that the business process would gather all the data that you want. This scenario is highly unlikely because the results would include just one figure.

Possible sources for comp IDs are Payroll for North America and HR (including the Manage Base Benefits business process). HR includes base pay (regular pay comprised of multiple components of pay stored in the Job and Compensation records), and incentives and ad hoc payments from the Variable Compensation business process.

Time Periods

You define a time period for the information you want to report, using the standard From and Thru Date fields. You also specify the period frequency. This indicates the number of times within the period that you want to calculate total compensation amounts: monthly, quarterly, or annually. You define all the time periods when you set up the Total Compensation reporting plans.

For example, if you specify quarterly as the period frequency, the from date January 1, 2004, and the through date December 31, 2004, the system extracts data four times for 2004: March 1, 2004, June 1, 2004, September 1, 2004, and December 1, 2004. If you specify quarterly as the period frequency, the from date January 1, 2004, and the through date December 31, 2005, the system extracts data eight times.

Note. Report data is more accurate when you extract data more often. For example, within a one-year period, a monthly extraction (12 times) is more accurate than an annual extraction (once). Because generating such accurate reports requires processing time, you should explore the processing capacity of your hardware.

The system ensures that the period frequency is compatible with a plan's from and through dates.

You can have one reporting plan with several from and through dates. When you run the extraction process, you can specify a subset of the plan's dates. For example, plan number seven is set up with a two-year time period. When running the extraction process, you can specify a one-year period.

For OLAP users, this value also indicates the level of navigation into a cube.

Preventing Double Accounting

Safeguards in HCM greatly reduce the possibility of double accounting. However, there are two instances when the system can theoretically count compensation values more than once:

*   If a worker is in more than one reporting group, his or her total compensation is counted each time the business process encounters him or her in a group.

    Run the Group Overlapping report to prevent this type of double accounting.

*   Compensation amounts are extracted from the HR and Benefits Administration applications.

    Payroll amounts are extracted from Payroll for North America. To prevent the possibility of double accounting, specify whether a comp ID is a compensation amount or a payroll amount. The system uses this attribute to store compensation and payroll amounts separately in the data warehouse and as separate measures in OLAP. This ensures that compensation data coming from HR or Benefits Administration is not aggregated with payroll data.

See Also

Chapter 3

Setting Up the Total Compensation Reporting Structure

This chapter provides an overview of tools and discusses how to:

* Define roll-up categories.

* Define compensation sources.

* Define compensation IDs (comp IDs) and map extract data.

* Map benefits and deductions.

* Map taxes.

* Map earnings codes.

* Map multiple components.

* Map variable compensation.

* Set up the Compensation Tree.

Understanding Tools

Before beginning the setup process, familiarize yourself with these tools:

* Cube Builder

* Tree Manager

* Group Build

Note. Cube Builder integrates with some third-party online analytical processing (OLAP) tools.

See Also

PeopleTools 8.52: Tree Manager PeopleBook

Defining Roll-up Categories

To set up roll-up categories, use the Roll-up Categories (TC_CATEGORY_GBL) component. Use the CI_TC_CATEGORY component interface to load data into the tables for this component.

This section provides an overview of the predefined roll-up categories and discusses how to define roll-up categories.

Understanding the Predefined Roll-up Categories

Total compensation roll-up categories are the nodes and leaves of the Compensation Tree because they group the compensation IDs together. They are key elements in the reporting structure because they define how the compensation data is organized and rolled up. This determines the structure of the results.

You define roll-up categories by defining:

1. The nodes and leaves of the Compensation Tree.

2. The Compensation Tree itself.

Note. It is possible to define compensation IDs and roll-up categories as you build the Total Compensation Tree (TC Tree).

The PeopleSoft predefined roll-up categories for the Compensation Tree are listed in this table. You can select or modify these categories, or create categories that reflect your organization's compensation plan. If you add a category on the Roll-up Category page, you use the PeopleSoft Tree Manager to add it to the Compensation Tree.

Category Name	Description	Category Name	Description
ADD	ADD Plan	KAISER	Kaiser Medical
ALLOWANCES	Employee Allowances	LEAVE	Leave Plan
BAS-LIFE	Basic Life	LIFE	Life Insurance
BASEPAY	Base Pay Earnings roll-up	LTD	Long Term Disability
BCBS	Blue Cross Medical	MEDICAL	Medical
BENEFITS	Benefits Compensation roll-up	OTHER	Other Compensation
DENTAL	Dental Benefits Programs	PAIDTMOFF	Paid Time Off

Category Name	Description	Category Name	Description
DEP-LIFE	Dependent Life Insurance	PROGCRD	Benefit Program Credit
DISABILITY	Disability	SAVINGS	Savings Plan
EARNINGS	General Earnings roll-up	SICK	Sick Plan
FSA	FSA Plan	STD	Short Term Disability
FSA-DEP	FSA Dependent Care	SUPP-LIFE	Supplemental Life Insurance
FSA-HEALTH	FSA Health	TAXES	Employer Paid Taxes
GEN-DED	General Deductions	TOTALCOMP	Total Compensation Roll-up
HEALTH	Health Benefit Plans roll-up	VACATION	Vacation Leave Plan
INCENTIVE	Incentive Pay	VISION	Vision Plan

Page Used to Define Roll-up Categories

Page Name	Definition Name	Navigation	Usage
Roll-up Category	TC_CATEGORY	Set Up HRMS, Product Related, Compensation, Total Compensation, Roll-up Category, Roll-up Category	Define additional roll-up categories for the Compensation Tree.

Defining Compensation Sources

To define compensation sources, use the Compensation Source (TC_COMP_SOURCE_GBL) component.

This section provides an overview of predefined compensation sources and discusses how to define compensation sources.

Understanding Predefined Compensation Sources

HCM has already associated a predefined set of compensation sources with the extract programs used to retrieve the data. The way the sources are mapped determines the extracts that are run. For example, benefits data is mapped to benefits and deductions.

The Compensation Source page is used mostly for ad hoc awards, for which no extraction is necessary.

You define compensation sources by:

1. Defining the additional compensation sources, such as ad hoc awards.

2. Adding and modifying the compensation IDs.

The predefined compensation sources are listed in this table, with the associated extract programs and maps.

Warning! Do not modify the predefined compensation sources. PeopleSoft cannot guarantee the results if you modify the predefined sources.

Comp Source	Source Application	Source Type	Extract Program	Mapping
BENEFITS	Benefits Administration	Extract	HR_TCBENEF	Benefits and Deductions
COMP	HR	Extract	HR_TCMCOMP	Components of pay are extracted and mapped to compensation IDs using the delivered mapping multiple components of pay (MCOP).
VARCOMP	HR	Extract	HR_TCVCOMP	Earnings and Var Comp Programs
PAYDEDUCT	Payroll for North America	Extract	HR_TCPYDED	Benefits and Deductions
PAYEARNS	Payroll for North America	Extract	HR_TCPYERN	Earnings
PAYTAX_CAN	Payroll for North America	Extract	HR_TCPYTAX	Taxes - Canada
PAYTAX_US	Payroll for North America	Extract	HR_TCPYTAX	Taxes - USA

Page Used to Define Compensation Sources

Page Name	Definition Name	Navigation	Usage
Compensation Source	TC_COMPSOURCE	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation Source, Compensation Source	Define additional sources of total compensation data, such as ad hoc worker or ad hoc organization awards. Do not modify any existing sources.

See Also

Defining Compensation Sources

Access the Compensation Source page (Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation Source, Compensation Source).

Compensation Source page

Source Type   Select from the list of values. *Extract* refers to the predefined compensation sources because they map to Application Engine extract programs.

If you add compensation sources for ad hoc worker or organizational rewards, select *Ad-Hoc Emp* or *Ad-Hoc Org*. The data from these sources directly enters into the data warehouse and won't need to be extracted.

Amount Type	Select either *Comp Amt* (compensation amount) or *Payroll Amt* (payroll amount). Use the amount type to qualify the data being extracted or added. This way, you can ensure that there is no double accounting between the compensation amounts extracted from HR and the payroll amounts.
	If the source type is *Extract* and the extract program is one of the payroll extracts, the Amount Type field is unavailable and is set to *Payroll Amt.*
	If the source type is *Extract* and the extract program is one of the benefit extracts, the Amount Type field is unavailable and is set to *Comp Amt.*
	If the source type is *Ad-Hoc Org* or *Ad-Hoc Emp,* the Extract Program field is unavailable.
Extract Program	This is normally unavailable for selection. Ad hoc entries don't need extractions.
	If you select *Extract* as the source type, the Extract Program field is available. You have already defined the extract program name for each predefined compensation source. This is the name of the Application Engine extract process that extracts data from the HCM system and puts it in the data warehouse.
Map Based On	If you entered a source type of *Ad Hoc Emp* or *Ad Hoc Org,* then indicate *No Mapping.*
	See Chapter 3, "Setting Up the Total Compensation Reporting Structure," Understanding Predefined Compensation Sources, page 14.

See Also

Defining Compensation IDs and Mapping Extract Data

To define compensation IDs and map extract data, use the Compensation Definition (TC_COMP_DEFN_GBL) component. Use the CI_TC_COMP_DEFN component interface to load data into the tables for this component.

This section provides overviews of compensation IDs and compensation mapping and discusses how to:

* Add and modify compensation IDs.

* Map compensation IDs.

Understanding Compensation IDs

Your company's Compensation Tree is made up of a number of compensation IDs. PeopleSoft provides predefined compensation IDs. You modify these or create new ones according to the way your company handles compensation. If you give ad hoc awards to workers or organizations, you must create compensation IDs for those awards.

As discussed in the previous section, you associate a comp ID with both the compensation sources and the extract process that retrieves the data from the source.

After you have determined the predefined comp IDs that you need to modify:

1. Modify the comp IDs or add new comp IDs.

2. Map new comp IDs to their compensation sources.

    You may need to access an additional page to complete the mapping.

See Chapter 3, "Setting Up the Total Compensation Reporting Structure," Defining Compensation Sources, page 13.

Predefined Compensation IDs

This table lists the predefined comp IDs and their mapping.

Comp ID	Mapping (Sources)	Comp ID	Mapping (Sources)
ADD-CR	Benefits and Deductions	STD-CR	Benefits and Deductions
ADD-EE	Benefits and Deductions	STD-EE	Benefits and Deductions
ADD-ER	Benefits and Deductions	STD-ER	Benefits and Deductions
BS-LIFE-CR	Benefits and Deductions	SUP-LIF-CR	Benefits and Deductions
BS-LIFE-EE	Benefits and Deductions	SUP-LIF-EE	Benefits and Deductions
BS-LIFE-ER	Benefits and Deductions	SUP-LIF-ER	Benefits and Deductions
BS-LIFE-TX	Benefits and Deductions	VACN-EE	Benefits and Deductions
DENTAL-CR	Benefits and Deductions	VISION-CR	Benefits and Deductions
DENTAL-EE	Benefits and Deductions	VISION-EE	Benefits and Deductions

Comp ID	Mapping (Sources)	Comp ID	Mapping (Sources)
DENTAL-ER	Benefits and Deductions	VISION-ER	Benefits and Deductions
DEP-LIF-CR	Benefits and Deductions	BASEPAY	Earnings
DEP-LIF-EE	Benefits and Deductions	FMLA_PAY	Earnings
DEP-LIF-ER	Benefits and Deductions	HOLIDAY	Earnings
FSA-DEP-EE	Benefits and Deductions	HOLIDAY_FL	Earnings
FSA-EE	Benefits and Deductions	INCENTIVE	Earnings
GEN-LOAN	Benefits and Deductions	JURY_DUTY	Earnings
GEN-PARK	Benefits and Deductions	PROG-CREDT	Earnings
LEAVE-EE	Benefits and Deductions	VAC/SICK	Earnings
LEAVE-V-EE	Benefits and Deductions	BASE_FLAT	Multiple Components
LTD-CR	Benefits and Deductions	BASE_HR	Multiple Components
LTD-EE	Benefits and Deductions	BASE_PCT	Multiple Components
LTD-ER	Benefits and Deductions	BASE_PTS	Multiple Components
MED-BCB-CR	Benefits and Deductions	NON_BS_FLT	Multiple Components
MED-BCB-EE	Benefits and Deductions	NON_BS_HR	Multiple Components
MED-BCB-ER	Benefits and Deductions	NON_BS_PCT	Multiple Components
MED-KS-CR	Benefits and Deductions	NON_BS_PTS	Multiple Components
MED-KS-EE	Benefits and Deductions	BASEPAY	No Mapping

Comp ID	Mapping (Sources)	Comp ID	Mapping (Sources)
MED-KS-ER	Benefits and Deductions	ER_PAID_TX	Taxes - United States
PROG-CREDT	Benefits and Deductions	FICA	Taxes - United States
SAV-EE-AT	Benefits and Deductions	EMP_PEN_TX	Taxes - Canada
SAV-EE-BT	Benefits and Deductions	ER_PAID_TX	Taxes - Canada
SAV-ER-AT	Benefits and Deductions	INCENTIVE	Var Comp
SAV-ER-BT	Benefits and Deductions	None	None

Understanding Compensation Mapping

This table lists the mapping field values and the associated pages. Use the pages to select the information to extract into the data warehouse as part of the comp ID. To access these pages, click the Go To Mapping link on the Compensation Mapping page.

Mapping Field Value	Object Name	Compensation Mapping Page Name
Ben/Deduct	TC_MAP_BENEFIT_SEC	Benefits Mapping
CAN Taxes	TC_MAP_TAX_CAN_SEC	Canadian Taxes Mapping
Earnings	TC_MAP_EARN_SEC	Earnings Code Mapping
MCOMP	TC_MAP_EARN_SEC	Multiple Components Mapping
No Mapping	None	(No mapping)
USA Taxes	TC_MAP_TAX_SEC	U.S. Taxes Mapping
Var Comp	TC_MAP_VCOMP_SEC	Variable Compensation Mapping

Pages Used to Define Compensation IDs

Page Name	Definition Name	Navigation	Usage
Compensation Definition	TC_COMP_DEFN	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Definition	Add or modify compensation IDs.
Compensation Mapping	TC_COMP_MAP	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping	Map new compensation IDs to their compensation sources.
Benefits and Deduction Mapping	TC_MAP_BENEFIT_SEC	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping Select *Ben/Deduct* in the Mapping field, and then click the Go To Mapping link.	Map new compensation IDs to benefits and other deductions.
Canadian Taxes Mapping U.S. Taxes Mapping	TC_MAP_TAX_CAN_SEC TC_MAP_TAX_SEC	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping Select *CAN Taxes* or *USA Taxes* in the Mapping field, and then click the Go To Mapping link.	Map new compensation IDS to Canadian or USA taxes.
Earnings Mapping	TC_MAP_EARN_SEC	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping Select *Earnings* in the Mapping field, and then click the Go To Mapping link.	Map new compensation IDs to earnings.

Page Name	Definition Name	Navigation	Usage
Multiple Components Mapping	TC_MAP_MCOMP_SEC	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping Select *MCOP* in the Mapping field, and then click the Go To Mapping link.	Map new compensation IDs to multiple components.
Variable Compensation Mapping	TC_MAP_VCOMP_SEC	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping Select *Var Comp* in the Mapping field, and then click the Go To Mapping link.	Map compensation IDs to variable compensation plans.

Adding and Modifying Compensation IDs

Access the Compensation Definition page (Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Definition).

Compensation Definition page

Compensation Type	Indicate by selecting from the list of values.
	Direct: Cash payment awards such as base pay, shift differentials, profit sharing, incentive pay, and bonuses.
	Indirect: Non-cash compensation awards such as company-paid medical, dental, vision, disability, life insurance, holiday leave, vacation leave, sick leave, and worker services and privileges (club memberships, parking, holiday gifts).
Organizational Cost	Specify whether this type is employer paid or worker paid. This ensures that the costs are not counted twice on the Employee Benefits statement.
	Select *Yes* when the cost is employer paid. Select *No* when the cost is worker paid. When you select *No,* the system does not total organizational costs.
Empl Compensation Total (employee compensation total)	Select *Yes* or *No* to indicate whether the system should include the comp ID value in calculating the employee compensation total.
	Selecting *Yes* indicates that the comp ID is considered part of the worker's total compensation. Selecting *No* indicates that the comp ID is not part of the worker's total compensation, but it is still a cost that you want to track.

Mapping Compensation IDs

Access the Compensation Mapping page (Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping).

Compensation Mapping page

Mapping	Select a value:*Ben/Deduct, CAN Taxes, Earnings, MCOP, No Mapping, USA Taxes, Var Comp.*
	The value that you select determines which extract program retrieves the specified comp ID. For example, you cannot specify earnings and expect benefits data in the results.
	For an ad hoc comp ID, select *No Mapping*.
Comp Source (compensation source)	Select from the translation list. The available values are based on the value that you select in the Mapping field.
Amount Type	The available values are limited based on the value that you select in the Comp Source field.
Go To Mapping	Click this link to access pages where you can view or modify details pertaining to the results returned by the extract program. The available pages depend on the value that you select in the Mapping field.

Mapping Benefits and Deductions

Access the Benefits and Deduction Mapping page (Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping). Select *Ben/Deduct* in the Mapping field, and then click the Go To Mapping link.

Benefits and Deduction Mapping page

Plan Type	Select from the list of values, which come from the Benefits Plan table. To include multiple plan types, insert additional rows.
Benefit Plan	Select from the list of values, which come from the Benefit/Deduction Program table.
Deduction Classification	Select from the list of values, which come from the Deduction table.
Sales Tax Type	Select from the list of values.
Deduction Code	Select from the list of values, which come from the Deduction table.
Description	When you press the tab key to move past the Deduction Code field, its description appears.

Cost Type	Select *Credit* or *Price*.

(CAN) Mapping Taxes

Access the Canadian Taxes Mapping page (Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping). Select *CAN Taxes* in the Mapping field, and then click the Go To Mapping link.

Canadian Taxes Mapping page

Canadian Tax Class	Select from the list of values. To map to multiple classes, insert additional rows.

(USA) Mapping Taxes

Access the U.S. Taxes Mapping page (Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping). Select *USA Taxes* in the Mapping field, and then click the Go To Mapping link.

U.S. Taxes Mapping page

Tax Class	Select from the list of values. To map to multiple classes, insert additional rows.

Mapping Earnings Codes

Access the Earnings Mapping page (Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping). Select *Earnings* in the Mapping field, and then click the Go To Mapping link.

Earnings Mapping page

| **Earnings Code** | Select from the list of values, which come from the Earnings Code Table. To map multiple codes, insert additional rows. |

Mapping Multiple Components

Access the Multiple Components Mapping page (Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping). Select *MCOP* in the Mapping field, and then click the Go To Mapping link.

Multiple Components Mapping page

| **Rate Code** | Select from the list of values. |

| **Comp Base Pay Switch** (compensation base pay switch) | Indicates whether a component of pay is included in the Base Pay calculation for a worker. |

| **Rate Code Class** | Appears only when the rate code is associated with a rate code class. |

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM Application Fundamentals Preface"

Mapping Variable Compensation

Access the Variable Compensation Mapping page (Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping). Select *Var Comp* in the Mapping field, and then click the Go To Mapping link.

Variable Compensation Mapping page

| **Variable Compensation Plan ID** | Select from the list of values, which come from the Variable Compensation Plan Table. |

Setting Up the Compensation Tree

PeopleSoft HCM comes with a predefined Compensation Tree. Use PeopleSoft Tree Manager to manipulate the tree. Remember that the Compensation Tree dictates the structure of the data warehouse and the way data is rolled up.

Note. You must set up your tree—that is, arrange the comp IDs and roll-up categories—before you run any of the extract programs. If you do not, the joins fail and no data is extracted from the data warehouse.

This screenshot shows the predefined Compensation Tree:

Total Compensation Tree

See Also

PeopleTools 8.52: Tree Manager PeopleBook

Chapter 4

Setting Up Reporting Groups

This chapter provides an overview of reporting groups and discusses how to populate reporting groups.

Note. This chapter assumes that you are familiar with the concept of building groups.

Understanding Reporting Groups

Reporting for compensation is different from reporting for other aspects of HCM. Therefore, the groups that you build in Total Compensation will probably differ from other groups that you build in HCM. These groups are strictly for reporting.

For example, a compensation manager wants a report on her company's two industries, so she sets up groups as follows:

- Industry A

  - Executives Group 1.

  - Sales Group 2.

  - Non-exempt Group 3.

- Industry B

  - Executives Group 4.

  - Sales Group 5.

  - Non-exempt Group 6.

The process of populating reporting groups involves populating two tables, TC_TIME and TC_POPULATION. It also generates an exchange file (exchange.csv). This file stores the rates of exchange between the potential workers' job currencies and the currency of the total compensation reporting plan.

A third party application can load this file in a cube. This way, you can use the multi-currency function and switch between currencies. Compensation and payroll amounts can be displayed in any currency from the exchange file.

There is no limit to the number of reporting groups. However, an individual cannot belong to more than one reporting group. If, by mistake, an individual does belong to more than one group, his or her compensation is counted multiple times because of the roll-up structure of the Compensation Tree. You can avoid this by running the Group Build Overlapping Groups report.

You use this procedure to build a reporting group:

1. Use the Group Build pages to build groups.

2. To ensure that the populations in your groups do not overlap, run the Group Member Overlap report.

3. Use the groups to set up total compensation reporting plans.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions"

Populating Reporting Groups

To populate reporting groups, use the Create Reporting Groups (TC_GROUP_RUNCTL) component.

This section discusses how to populate reporting groups.

Page Used to Populate Reporting Groups

Page Name	Definition Name	Navigation	Usage
Create Reporting Groups	TC_GROUP_RUNCTL	Compensation, Total Compensation, Calculate Total Compensation, Create Reporting Groups, Create Reporting Groups	Populate the reporting groups that you define.

Populating Reporting Groups

Access the Create Reporting Groups page (Compensation, Total Compensation, Calculate Total Compensation, Create Reporting Groups, Create Reporting Groups).

Create Reporting Groups page

Total Comp Plan ID (total compensation plan ID)	Select from the options.
Total Comp Plan Effective Date (total compensation plan effective date)	Select from the options.
Run Type	Select the type of run:
	Standard populates the TC_POPULATION table with all the workers from all the groups associated with the specified TC Plan ID. If you are rerunning this process, a standard run deletes all previous information and enters new data into the table.
	Delete deletes all the group records.
Run	Click to run the Group Population process.

Chapter 5

Setting Up Total Compensation Reporting Plans

This chapter discusses how to:

- Define a reporting plan and associate it with a group ID.

- Associate trees and group IDs with a plan.

Defining a Reporting Plan and Associating It with a Group ID

To define a reporting plan and associate it with a group ID, use the Total Comp Reporting Plan (TC_PLAN_GBL) component.

This section discusses how to create, review, and update a plan.

Pages Used to Set Up Total Compensation Reporting Plans

Page Name	Definition Name	Navigation	Usage
Definition	TC_PLAN	Set Up HRMS, Product Related, Compensation, Total Compensation, Total Comp Reporting Plan, Definition	Create, review, and update a reporting plan.
Total Comp Plan Group (total compensation plan group)	TC_PLAN_GRP	Set Up HRMS, Product Related, Compensation, Total Compensation, Total Comp Reporting Plan, Total Comp Plan Group	Associate a tree and group IDs with a reporting plan.

Creating, Reviewing, and Updating a Plan

Access the Definition page (Set Up HRMS, Product Related, Compensation, Total Compensation, Total Comp Reporting Plan, Definition).

Definition page

Period Frequency	Select *Annually, Monthly,* or *Quarterly.*This determines how often compensation is extracted and calculated. For OLAP users, this value represents the lowest level of the cube.

Note. Report data is more accurate when you extract data more often. However, the processing time is substantial, so explore the capacity of your hardware.

Plan Frozen	The status of the reporting plan.

Selecting *No* means the plan is not frozen.

When you run the extracts, the reporting plan status changes to *Yes.* While the dates, frequency groups, and currency information are unavailable, you can add additional compensation definitions using the tree you specify for that plan. When all extracts are complete, you cannot add ad hoc compensation or perform recalculations.

To change the reporting plan status back to *No,* run the extracts in delete mode.

From Date	The extraction process retrieves data dated on or after this date. The date that you specify here cannot be earlier than the date in the Effective Date field.

Through Date	The date changes to the end of the month if you enter a number greater than 28.

Rate Type	Select the currency rate type. Values come from the Currency Rate Type Table.
	Select the same rate type that you specify throughout the HCM application.
Effective Date Flag	Select either *Effdt* or *Thru Date.*
	The system looks in the Currency Rate Table and uses the currency exchange rate with an effective date closest to but less than the Currency Effective Date that you enter here—or closest to but less than the *Through Date* of the plan, if the *Thru Date* option is selected.
Currency Effective Date	Select the date that you want the system to use in order to calculate the exchange rate. Use either the plan's Through Date or the value in the Currency Effective Date field.

Warning! In order for your extract to run, every base currency specified on the Definition page must be mapped to any other currencies used in the data sources on which you run your extract processes. For example, if a worker is set up in Job with a monthly salary of USD 3000, and another worker in the system has a monthly salary of CAD 5000, then map both currencies to each other. Map the currencies at Set Up HRMS, Foundation Tables, Currency and Market Rates, Market Rates.

Associating Trees and Group IDs with a Plan

Access the Total Comp Plan Group page (Set Up HRMS, Product Related, Compensation, Total Compensation, Total Comp Reporting Plan, Total Comp Plan Group).

Total Comp Plan Group page

Tree Name   Select the compensation tree from the list of values, which come from the PSTREEDEFN table. You can only select from compensation trees that have structure IDs of *Compensation.*

Group ID   Select groups from the list.

Add groups as needed for this plan. Ensure that an individual is not in more than one group.

See Also

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Chapter 6

Setting Up the OLAP Cubes

This chapter provides overviews of online analytical processing (OLAP) reporting and PeopleSoft predefined dimensions and measures and discusses how to:

*   Create the Total Compensation Department Tree.

*   Fill in the ALL_TIME Tree.

Note. The Cube Builder, including the Compensation cube and Headcount/FTE cubes, are designed to be OLAP platform independent and to integrate with third party applications.

Understanding OLAP Reporting

With OLAP reporting, you can view compensation data from different axis points and move easily from one view to another.

Use OLAP to identify the dimensions (attributes) of the data and then combine the dimensions in various ways. For example, analyze total compensation data by looking at it from several perspectives—for example, department, jobcode, and time, as shown here:
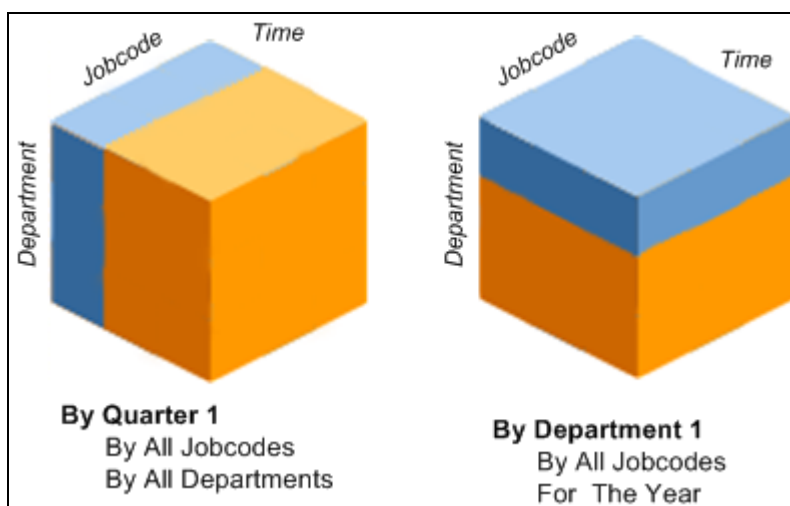
Example cubes showing dimensions of data for department, jobcode and time

Define the cube and then *slice and dice* the data based on combinations of these dimensions. For example, examine the total compensation data for the training department of the Western Region for the year. When you analyze the data, *slice* off part of the cube or *dice* it to get to an individual cell.

Understanding PeopleSoft Predefined Dimensions and Measures

The measures for the Compensation cube are Compensation Amount and Payroll Amount. The system places amounts extracted from a source marked Comp Amt into the Compensation Amount measure, and places amounts extracted from a source marked Payroll Amt into the Payroll Amount measure.

The measures for the Headcount/FTE Cube are FTE and Headcount.

This table lists the total compensation dimensions provided with HCM. Most of the dimensions are in both the Compensation and Headcount/FTE Cubes.

Dimension	In Which Cubes?	Rollup Type	Comments
TC_BUS_UNIT	Both	Query	Retrieves the business units and their descriptions. All the business units are rolled up into the All Business Units umbrella. This query also retrieves the All Business Units text from the Message Catalog for globalization purposes.
TC_CATEGORY	Both	Query	Retrieves the workers labor agreement and categorization information.
TC_COMPANY	Both	Query	Grouped by country and company code. You usually won't alter the query.
TC_COMPENSATION	Compensation	Tree	You modified this tree when you set up the total compensation reporting structure.

Dimension	In Which Cubes?	Rollup Type	Comments
TC_DEPT	Both	Tree	TC_DEPT trees are copies of standard department trees in which the department IDs are the concatenation of the setID with the standard department ID. For instance, Department 10001 on the US Department Tree is Department USA10001 in the related TC Department Tree.
TC_EE_COMPTOTAL	Compensation	Query	Determines whether you have specified that the comp ID is included in the compensation total. You specify this in the Empl Compensation Total field on the Compensation Definition page.
TC_JOBCODE	Both	Query	Grouped by job function and JobCode. You usually won't alter the query.
TC_LOCATION	Both	Query	Grouped by country, state/province, and location code. You usually won't alter the query.
TC_POSITION	Both	Query	Grouped by position.
TC_SALARY_LEVEL	Both	Query	Grouped by salary administration plan and salary grade. You usually won't alter the query.
TC_TIME	Both	Tree	Modify this query to match the ALL_TIME tree.

Dimension	In Which Cubes?	Rollup Type	Comments
TC_TYPE	Compensation	Query	Determines whether you have specified that the comp ID is worker paid or employer paid. You specify this in the Organizational Cost field on the Compensation Definition page.

See Also

Creating the Total Compensation Department Tree

To create total compensation department trees, use the Total Comp Department Tree (TC_DEPT_TREE_GBL) component.

This section discusses how to create a department tree.

Page Used to Create a Department Tree

Page Name	Definition Name	Navigation	Usage
Total Comp Department Tree (total compensation department tree)	TC_DEPT_TREE	Set Up HRMS, Product Related, Compensation, Total Compensation, Total Comp Department Tree, Total Comp Department Tree	Duplicate your Security Tree to create a Department Tree. The new tree is named TC_DEPT and appears with the other HR trees in PeopleSoft Tree Manager.

Creating a Department Tree

Access the Total Comp Department Tree page (Set Up HRMS, Product Related, Compensation, Total Compensation, Total Comp Department Tree, Total Comp Department Tree).

Total Comp Department Tree page

HCM enables you to duplicate your DEPT_SECURITY Tree, which should already be set up by department for use with the cubes. Create the new Department Tree with the Total Comp Department Tree page. This is a mandatory step.

Filling in the All_TIME Tree

HCM provides the skeleton ALL_TIME Tree, which represents the time dimension of your cubes. Use Tree Manager to construct the tree to meet your needs and to define how time periods roll up. This is how you tell the system that, for example, January 2004, February 2004, and March 2004 make up Q1 2004 and that Q1 2004, Q2 2004, Q3 2004, and Q4 2004 make up the year 2004.

You also have the option of using dynamic ranges to determine your time period rollups at run time. The time rollup periods are determined at run time, based on the reporting plan. The length of each time rollup period matches the frequency of the reporting plan. You do not need to create a TC_TIME Tree for each reporting period. For example, if a plan that is dated January 1, 2000 through December 31, 2010 has a frequency of annual, the rollup time periods would be 10 calendar years (2000 to 2010).

See Also

PeopleTools 8.52: Tree Manager PeopleBook

Chapter 7

Extracting Total Compensation Data

This chapter provides overviews of data extraction, Multiple Components of Pay, and Variable Compensation and discusses how to:

• Extract payroll data

• Extract compensation data

Note. This chapter assumes that you have already set up your total compensation reporting structure.

See Also

Understanding Data Extraction

Compensation data is stored in more than one place in HCM; therefore, you may need to run several extracts to obtain a complete analysis.

Note. If you are using cubes, the results from all compensation extractions can be summed together into one measure.

After you set up the total compensation reporting structure and define a reporting plan, you fill the data warehouse by extracting data from Benefits, HR, and Payroll for North America. There are four possible sources for data extraction: Payroll, Multiple Components of Pay, Variable Compensation, and Benefits. These processes separately store amounts extracted from multiple components of pay and payroll earnings to prevent double accounting.

Note. Before running any of the extraction processes, map the multiple components of pay, variable compensation awards, and benefits amounts to compensation IDs. All the compensation IDs must be included in the Compensation Tree, using rollup categories. Ensure that the Compensation Tree is valid for the duration of the total compensation reporting plan.

If you manage variable compensation plans with groups and you want to report on those awards in the Total Compensation business process, use the same group IDs in the Variable Compensation and Total Compensation business processes.

Process Name	Compensation Source	Source Application
HR_TCBENEF	BENEFITS (K001)	Extracts benefits and deductions data from Benefits Administration.
HR_TCMCOMP	COMP	Extracts base pay data from HR.
HR_TCVCOMP	VCOMP	Extracts earnings and variable compensation from HR.
HR_TCPYDED	PAYDEDUCT (K003)	Extracts benefits and deductions from Payroll for North America. Selects DED_CUR from PAY_DEDUCTION for Empl/Ded Cd.
HR_TCPYERN	PAYEARNS (K004)	Extracts earnings from Payroll for North America.
HR_TCPYTAX	PAYTAX_CAN (K005)	Extracts Canadian taxes from Payroll for North America.
HR_TCPYTAX	PAYTAX_US (K006)	Extracts U.S. taxes from Payroll for North America.

Some awards in the Variable Compensation business process are based on the attainment of target awards by certain dates. If those awards are not yet calculated in the Variable Compensation business process, then the Total Compensation business process assumes all the goals are attained (100% attainment) and uses part of the Determine Allocation process logic from the Variable Compensation business process to compute the target awards.

To calculate target awards, select the Calculate Target Awards check box on the Extract Comp or Payroll Data run control page.

Ad hoc awards are extracted in Total Compensation. Note that the Calculate Target Awards process has no impact on ad hoc plans.

When the extraction processes are running, view the process status with the Review Status of Extract page.

Note. See your account manager if you want to modify your Total Compensation business process to work with other third-party applications and you need to develop modified trees, transaction pages, and Application Engine extracts.

See Also

PeopleSoft HR 9.1 PeopleBook: Manage Variable Compensation, "Calculating Allocations and Awards," Determining Allocations

Understanding Multiple Components of Pay

The Multiple Components of Pay (MCOP) business process retrieves components of pay from the PS_COMPENSATION table. It performs these steps:

1. Retrieves the run control data.

2. Retrieves the period frequency data.

3. Verifies that the associated groups are populated.

4. Retrieves the Administer Compensation data.

5. Populates the data warehouse for each worker in the groups, using the mapping between the compensation rate codes and comp IDs (the mapping is defined on the Compensation Mapping page).

See Also

Understanding Variable Compensation

The Variable Compensation business process retrieves awards coming from any potential plans that are selected on the Compensation Mapping page (these plans are defined and managed in this business process).

Variable Compensation performs these functions:

1. Retrieves the run control data.

2. Retrieves the period frequency data.

3. Verifies that the associated groups are populated.

4. Retrieves the awards from the Variable Compensation plan, and writes them in the TC_EE_DETAIL table.

5. Calls the Determine Allocations process to calculate target awards for future time periods and updates the TC_EE_DETAIL table (optional).

6. Populates the data warehouse TC_EE_DETAIL table for each worker in the group, using the mapping between the Variable Compensation Plan awards and compensation IDs (the mapping is defined on the Compensation Mapping page).

Extracting Payroll Data

The data extract process for Payroll for North America retrieves a worker's actual earnings, deductions and taxes along with employer paid taxes. Because this data is stored in more than one PeopleSoft table, there are three payroll extract programs:

- TCPYERN: Extracts payroll actual earnings.

- TCPYDED: Extracts payroll actual deductions withheld.

- TCPYTAX: Extracts payroll actual taxes withheld.

Warning! The PeopleSoft HR payroll data is *actuals.* This means that payroll retrieves the actual, or real amount. Processing is time-consuming. Consider running payroll extracts monthly or quarterly.

Extracting Compensation Data

To extract total compensation data, use the Calculate Benefits (RUN_CNTL_TOTL_COMP) component.

This section discusses how to:

- Extract benefits data.

- Run the benefits calculations.

- Run extracts.

Pages Used to Extract Total Compensation Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Calculate Benefits	RUN_CNTL_TOTL_COMP	Compensation, Total Compensation, Calculate Total Compensation, Calculate Benefits, Calculate Benefits	Run the benefits calculation.
Review Benefits Calculation	CALC_MESSAGE	Compensation, Total Compensation, Calculate Total Compensation, Review Benefits Calculation, Review Benefits Calculation	Display information about any errors that occurred during the benefits calculation process.

Page Name	Definition Name	Navigation	Usage
Extract Comp or Payroll Data (extract compensation or payroll data)	TC_RUN_CNTL_PNL	Compensation, Total Compensation, Calculate Total Compensation, Extract Comp or Payroll Data, Extract Comp or Payroll Data	Run the extracts and view the run history.
Review Status of Extract	TC_PLAN_INQ_PNL	Compensation, Total Compensation, Calculate Total Compensation, Review Status of Extract, Review Status of Extract	View the status of the extracts for a given reporting plan.

Extracting Benefits Data

To extract benefits data using the benefits process:

1. Run the benefits calculation process (the COBOL process PSPTCRUN).

   View the error messages on the Review Benefits Calculation page.

2. Run the benefits extract (the Application Engine process HR_TCBENEF).

If you use the Benefits business process, running the benefits process is a prerequisite.

Use the Calculate Benefits page to run the benefits calculation process, which collects benefits enrollment data, effective as of the through date that is defined in your reporting plan. This process calculates the worker and employer shares of the costs. If you run Benefits Administration, this process also calculates any applicable general, optional, and waived credits.

The number of calculations the process performs is based on the period frequency that you specify on the Total Comp Reporting Plan - Definition page.

Note. The benefits calculation process results are accurate if you select the monthly period frequency. If you select the quarterly or annual period frequency, the calculation is an approximation: It is calculated for the last month of the period and then multiplied by the number of months in the period. Changes to a worker's enrollment during the period being calculated are not reflected in the calculation. The calculation reflects the worker's enrollment on the last day of the period.

The benefits calculation process retrieves the benefits in the TC_POPULATION table, which is filled by the group population process. The process calculates rates based on this information and stores the data in a temporary table (TOTAL_DED).

The process calculates estimates for workers with multiple jobs. A benefits calculation is performed for each benefit record number using information from the benefits primary job. For example, if worker ID (EmplID) 8001 has three employment record numbers and two benefit record numbers, benefits calculations are performed for these combinations:

EmplID	Empl Record Number	Benefits Primary Job	Ben Record Number	Benefits Calc Performed?
8001	0	No	0	No
8001	1	Yes	0	Yes
8001	2	Yes	2	Yes

Calculation rules specify a grouping method (this is the same way that eligibility rules are set up). The calculation rules, along with the Combine Salaries check box and the Include for Deductions option, determine the deduction or coverage amount.

The primary job indicator controls the frequency of the benefit deductions and flex credits. Benefit deductions are taken and flexible credits are paid only when the primary job is part of the payroll calculation.

For benefit plans that are based on a worker's actual earnings (such as savings, retirement, or pension), deductions are taken in one of these ways:

- If the contribution is a based on a percentage, the deduction is taken for every check for the benefit record.

- If the contribution is based on a flat amount, the deduction is taken when the primary job is paid.

Note. There is never more than one set of benefits data in TOTAL_DED for a given TC Plan ID. When you rerun PSPTCRUN, it deletes from TOTAL_DED any records that have the same TC Plan ID. There is no utility provided to purge this table of outdated information. You must manage this cleanup process.

The benefits calculation process writes to the PS_TOTAL_DED table.

The Application Engine process writes data to the TC_EE_DETAIL table.

See Also

Running Benefits Calculations

Access the Calculate Benefits page (Compensation, Total Compensation, Calculate Total Compensation, Calculate Benefits, Calculate Benefits).

Calculate Benefits page

Total Comp Plan ID (total compensation plan identification)

Select the plan ID and effective date for the calculation. The plan's description then appears.

Chk Point Interval in Minutes (check point interval in minutes)

Enter the restart information in minutes.

Running Extracts

Access the Extract Comp or Payroll Data page (Compensation, Total Compensation, Calculate Total Compensation, Extract Comp or Payroll Data, Extract Comp or Payroll Data).

Extract Comp or Payroll Data

Run Control ID: PS   Report Manager   Process Monitor   [Run]

*Total Comp Plan ID: BENAMS   🔍   *Effective Date: 01/01/1998   🔍

*From Date: 01/01/1997   📅   *Thru Date: 12/31/1997   📅

*Run Type: Standard ▼   ☐ Calculate Target Award

Prior Plan Runs		Customize | Find | View All | 🔲 | 🎴 First ◄ 1 of 1 ► Last		
Program	Run Date and Time	From	Thru Date	Program Status

Extract Comp or Payroll Data page

Run Type	Select *Standard* for a normal, first time run. After you begin a run, the report plan status is frozen; you cannot modify the interval dates or plan groups.
	The only way to change the reporting plan status back to unfrozen is to run the extracts in deletion mode.
	Select *Delete* to rerun a process. This purges the data in the TC_EE_Detail table. After the reporting plan status is unfrozen, the plan dates and groups are available for modification. Select *Standard* to retrieve the information.
Calculate Target Award	Select to include data from the determine allocation process in the Manage Variable Compensation business process.
	If you deselect this check box, the TCVARCMP process extracts data from just the VC_AWARD Table. For example, Q1 and Q2 contain data from VC_AWARD, but Q3 and Q4 do not. If you select this check box, targeted awards for Q3 and Q4 are calculated and included.
Prior Plan Runs	The fields in this group box are populated with the history of this plan's previous runs.

Chapter 8

Including Ad Hoc Information in the Data Warehouse

This chapter provides an overview of ad hoc information and discusses how to add ad hoc awards.

Understanding Ad Hoc Information

To add ad hoc awards for workers, use the Adhoc Comp for Employees (TC_ADHOC_EMPLOYEE) component. To add ad hoc awards for organizations, use the Adhoc Comp for Organization (TC_ADHOC_ORG) component.

Typically, ad hoc awards represent organizational costs that are not tracked within the HCM system. Ad hoc worker awards may, for example, include special cash performance awards, team awards, and paid parking for executives. Ad hoc organization awards may, for example, include company provided food items, such as coffee and pastries, and holiday gifts, such as turkeys.

You do not need to extract ad hoc data; it is always available for reports and inquiries.

Adding an Ad Hoc Award

To add an ad hoc award:

1. Set up a compensation source on the Compensation Source page.

    Set the Source Type field to *Ad Hoc Emp* or *Ad Hoc Org.* Leave the extract program blank. Set the Map Based On field to *No Mapping.*

2. Set up a compensation ID for the award.

    Use the Compensation Definition page.

3. Insert the new compensation ID into the Total Compensation Tree.

    Use PeopleSoft Tree Manager.

4. Add the ad hoc information on either the Adhoc Comp for Employees page or the Adhoc Comp for Organization process page.

    After you save the page, the information is added to the data warehouse.

5. Continue viewing compensation data, processing OLAP cubes, or running reports.

See Also

Pages Used to Add Ad Hoc Awards

Page Name	Definition Name	Navigation	Usage
Adhoc Comp for Employees (ad hoc compensation for employees)	TC_ADHOC_EMPL	Compensation, Total Compensation, Calculate Total Compensation, Adhoc Comp for Employees, Adhoc Comp for Employees	Add ad hoc compensation for a small number of workers.
Adhoc Comp for Organization	TC_ADHOC_ORG	Compensation, Total Compensation, Calculate Total Compensation, Adhoc Comp for Organization, Adhoc Comp for Organization	Add ad hoc compensation for a group of workers.

Adding Ad Hoc Information for an Employee

Access the Adhoc Comp for Employees page (Compensation, Total Compensation, Calculate Total Compensation, Adhoc Comp for Employees, Adhoc Comp for Employees).

Adhoc Comp for Employees page

General Details

|	
Job As Of Date	This date is used by default as the as of date for the worker, job, and company information on this page.

Date Interval

This group box can be used to set the interval during which you offer the award. Use the plan's dates by default, or select the Date Override check box, and enter values in the From Date and Thru Date fields. The dates that you enter must fall within the plan's from and through dates.

Compensation Fields

Compensation Amount, Currency and **Converted Compensation Amount**	Enter the compensation amount and the currency of the award for this worker. The system calculates the amount of this award, converted into the reporting plan currency.

Adding Ad Hoc Information for a Group of Employees

Access the Adhoc Comp for Organization page (Compensation, Total Compensation, Calculate Total Compensation, Adhoc Comp for Organization, Adhoc Comp for Organization).

Adhoc Comp for Organization page

Plan Information	Enter plan information relevant to this award.
Date Interval	Enter a From Date and Thru Date for this award.
Organization	Enter the Job As Of Date and the Group ID of the award.
Amount	Enter the amount of the award. This is the total amount awarded to every person associated with the group ID.

Chapter 9

Viewing and Reporting on Total Compensation Data

This chapter provides an overview of viewing options and discusses how to:

- View compensation data online.

- View compensation data in Excel.

- Run total compensation reports.

Understanding the Viewing Options

You can use the Review Employee Total Comp page to view compensation data or to check the results of the Employee Compensation report before printing it.

In Excel, you can view any base and variable compensation information from HR. You cannot view Benefits Administration or payroll information with this feature.

Viewing Compensation Data Online

To view total compensation data online, use the Review Employee Total Comp (TC_EE_COMP) component.

This section discusses how to view worker total compensation.

Page Used to View Total Compensation

Page Name	Definition Name	Navigation	Usage
Review Employee Total Comp (review employee total compensation)	TC_EE_COMP	Compensation, Total Compensation, View Total Compensation, Review Employee Total Comp, Review Employee Total Comp	View on screen the compensation for all workers within the specified groups. This inquiry page gives the same results as the Total Comp Statement Report, except the output is to the screen.

Viewing Employee Total Compensation

Access the Review Employee Total Comp page (Compensation, Total Compensation, View Total Compensation, Review Employee Total Comp, Review Employee Total Comp).

Review Employee Total Comp page

From and **Thru Date**	Enter the dates for this inquiry. You can inquire on a subset of the plan's period.
Amount Type	Select *Compensation Amount,Payroll Amount,* or *(None).* These values refer to the data sources.
Refresh	When you enter or modify one of the parameters, click this link to load the associated data onto the page.
Compensation Detail	This group box contains the worker's compensation information.

Viewing Compensation Data in Excel

To view compensation data in Excel, use the Transfer Comp Data to Excel (TC_EXCEL_RUNCTL) component.

This section discusses how to view compensation data in Excel.

Page Used to View Compensation Data in Excel

Page Name	Definition Name	Navigation	Usage
Review Total Compensation	TC_EXCEL_RUNCTL	Compensation, Total Compensation, View Total Compensation, Transfer Comp Data to Excel	Launch Excel with information (base and variable pay) that you extract from HR.

Launching Excel

Access the Review Total Compensation page (Compensation, Total Compensation, View Total Compensation, Transfer Comp Data to Excel).

Population

Select whether you want Employee(s) or Group(s) in the results.

If you select *Employee(s),* you can select one or more EmplID. The worker's name appears.

If you select Group(s), you can select one or more Group ID. The group's description appears.

(Download)

Click to access Excel and have the data entered into a spreadsheet.

Note. When the Excel file is created, it is created and saved in the Default Log/Output directory on the server. To view this on the client machine, the file needs to be sent to the client using FTP. Set up an FTP server for read and write access to the default log output directory that is used.

Create a URL identifier to give the client access to the file on the FTP server.

Running Total Compensation Reports

This section discusses how to run total compensation reports.

Common Elements Used in This Section

Amount Type

Select one: *Compensation Amount, Payroll Amount,* and *(None).* These values refer to the data sources.

Group ID

You can run the reports on a subset of the groups specified for the selected TC plan ID. Select the groups within the specified TC plan ID for which you want to run this report.

Pages Used to Run Total Compensation Reports

Page Name	Definition Name	Navigation	Usage
Total Comp Statement Report (total compensation statement report)	TC_BEN_RUN_CNTL	Compensation, Total Compensation, View Total Compensation, Total Comp Statement Report, Total Comp Statement Report	Run the Total Compensation Statement (Benefits Statement) report (TC001) that provides a listing of all compensation for each individual, designed for distribution to workers.
Group Detail Compensation Rpt (group detail compensation report) Group Summary Compensation Rpt (group summary compensation report)	TC_GRP_RUN_CNTL	• Compensation, Total Compensation, View Total Compensation, Group Detail Compensation Rpt, Group Detail Compensation Rpt • Compensation, Total Compensation, View Total Compensation, Group Summary Compensation Rpt, Group Summary Compensation Rpt	Use this page to run these reports: • Group Detail Compensation report (TC003). This report lists detailed information about each compensation type for each individual within a group that you specify. To check the results of the report before printing it, use the Review Employee Total Comp page. **Note.** Ad hoc awards entered directly in the TC warehouse are reported on a separate page for each worker. • Group Summary Compensation report (TC002). This report provides aggregated information for individuals within a group that you specify. Each compensation ID that you define reports a value. If, for example, you specify a group of five workers and define three compensation IDs, the Group Compensation report gives three values, one for each compensation ID. The values are summed for the group.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HCM Reports"

Chapter 10

Processing OLAP Cubes

This chapter provides an overview on how to process cubes and discusses how to:

- Set the destination directory.

- Build cubes.

Understanding How to Process Cubes

To process cubes:

1. Set the destination directory.

2. Use the Build Cube page to build the cube.

3. Analyze the results with an online analytical processing (OLAP) tool.

   View and analyze the Compensation and Headcount/FTE cubes.

Note. You must process the Compensation cube and the Headcount/FTE cube from the Total Compensation business process. You can view the cubes with Cube Builder, but you must return to the Total Compensation business process to process them.

See Also

Chapter 6, "Setting Up the OLAP Cubes," page 37

Setting the Destination Directory

HCM places the cube processing output (the *.mdl, *.mdc, *.asc and *.log files) in the default directory, c:\temp. To change the destination directory, select Cube Builder, Build, Cube Instances, and click the Platform Options button.

Building Cubes

To build cubes, use the Build Cube (TC_RUNCNTL_CUBE) component.

This section discusses how to build a cube.

Page Used to Build Cubes

Page Name	Definition Name	Navigation	Usage
Build Cube	TC_RUNCNTL_CUBE	Compensation, Total Compensation, View Total Compensation, Build Cube	Build OLAP cubes.

Building a Cube

Access the Build Cube page (Compensation, Total Compensation, View Total Compensation, Build Cube, Build Cube).

Build Cube page

Cube Instance ID	Select the cube that you want to process.
Total Comp Plan ID (total compensation plan identification)	Select a total compensation plan ID.
As of Date	Enter the plan's effective date.
Time Rollup Attribute	Select *Average, Last Period,* or *First Period.* These values indicate how values are rolled up along the time dimension. For example, in order for full-time equivalent (FTE) values for four quarters to be averaged in a time rollup for an entire year, choose *Average.* For the last quarter value to be rolled up to represent the entire year, choose *Last Period.*

Drill Through Cube	Enter the path for the mdc file generated by the process. Third party applications can use this file to read all dimensions and measures. A default path appears, based on the information provided in your PeopleTools installation. Headcount appears by default if you are building the Compensation cube, while compensation appears if you are building the Headcount cube.
	The path and file names appear by default from the log/output directory you used when you chose which cube to create. You can change the directory and filename. This enables you to drill from the Compensation cube to the Headcount cube and vice versa. If you are creating the Compensation cube and the Headcount cube exists on the server in c:\temp\TC_HEADCOUNT.MDC, that should be the path and filename used. If the Headcount cube does not exist, you cannot drill through to it. Likewise, if you create the Headcount cube, the drill-through cube should be the Compensation cube.
Post-Build Script	Enter the path for the mdl file generated by the process. Third party applications can use this file for currency conversion. A default path appears, based on the information provided in your PeopleTools installation. The path and filename appear by default at the log\output directory when the cube is chosen. For the Compensation cube, the filename must be TC_COMP_P.MDL. For the Headcount cube, the filename must be TC_HD_P.MDL. This is a required field.

Note. You must build the data warehouse before you can build an OLAP cube.

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