PeopleSoft 8.00.01 Human Resources PeopleBook

Reporting Total Compensation

PeopleSoft 8.00.01 Human Resources PeopleBook: Reporting Total Compensation

SKU MAHRAr8SP1B1200_5

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Contents

Reporting Total Compensation

Chapter 1

Overview of Total Compensation Reporting

Chapter 2

Setting Up the Total Compensation Reporting Structure

Chapter 3

Defining Reporting Groups

Chapter 4

Setting Up Total Compensation Reporting Plans

Chapter 5

Setting Up the OLAP Cubes

Chapter 6

Populating Reporting Groups

Chapter 7

Extracting Total Compensation Data

Chapter 8

Including Ad Hoc Information in the Data Warehouse

Chapter 9

Processing the OLAP Cubes

Chapter 10

Using Total Compensation Inquiries and Reports

Index

REPORTING TOTAL COMPENSATION

This book, *Reporting Total Compensation,* discusses how to set up and use the four available reporting options to display Total Compensation information.

This book provides you with the information you need for implementing and using the Reporting Total Compensation module of PeopleSoft Human Resources. You can order the online version by requesting SKU HRB8SP1R0, or the hard-copy version by requesting SKU MAHRCr8SP1B 1200.

Overview of Total Compensation Reporting offers the user a basic understanding of the major components of the reporting module and how those components process the reporting results. The results include hard-copy reports, OLAP cubes, on-screen inquiries and a spreadsheet ready for viewing in Microsoft Excel.

Setting Up the Total Compensation Reporting Structure discusses in detail how to perform the first step in obtaining the reporting results. The predefined values are listed and samples are given.

Defining Reporting Groups discusses how to set up reporting groups.

Setting Up Total Compensation Reporting Plans discusses how to set up reporting plans.

Setting Up the OLAP Cubes discusses how to set up the predefined OLAP cubes.

Populating Reporting Groups discusses how to populate the reporting groups you've set up.

Extracting Total Compensation Data discusses how to run the various extract processes.

Including Ad Hoc Information in the Data Warehouse gives instructions for adding any ad hoc awards.

Processing the OLAP Cubes discusses how to run the OLAP cubes in order to obtain multidimensional reports.

Using Total Compensation Inquiries and Reports discusses how to run the three available reports: Employee Benefit Statement, Employee Compensation, and Group Compensation, and explains how to use the available inquiries.

Overview of Total Compensation Reporting

The Total Compensation Reporting module offers you several different choices to view and analyze information gathered from throughout PeopleSoft HRMS and North American Payroll. With North American Payroll and the Variable Compensation and Multiple Components of Pay modules, you defined all cash and non-cash compensation for your employees: salary, bonus, long-term incentives, benefits, perquisites, product discounts, work, and family programs.

To effectively manage the collective cost of compensating your employees, you must be able to track, report and analyze those costs. The Total Compensation Reporting module offers both hard-copy reports and a powerful OnLine Analytical Processing (OLAP) analysis model. The module also enables you to report on data that isn't in another PeopleSoft module. You can use the ad hoc pages to add additional awards for employees and have that data appear in the results.

This overview begins with the easiest subject to discuss: the reporting process results. The subject of setting up the reporting structure and obtaining the information you want for your reports and OLAP model is a more involved concept, and is discussed later on in this chapter.

Process Results

The Total Compensation Reporting module offers several possible reporting results: hard-copy reports, information displayed on-screen by way of inquiry pages, OLAP analysis models, and a spreadsheet output that you can use in Excel. You can obtain all these results by performing the same setup steps; however, the cubes require an additional few steps.

Reports

The Total Compensation Reporting module offers three reports:

- Employee Benefits Statement: This report offers a full listing of all compensation for each individual. When printed, each individual's statement appears on a separate sheet. This statement is designed for distribution to employees.

- Employee Compensation Report: This report provides detailed information about each type of compensation for each individual within a group that you specify.

- Group Compensation Report: This report contains one line of data for each individual within a group that you specify.

Inquiries

In addition to the hard-copy reports, you can display on-screen the total compensation and payroll amounts for one employee or for a group of employees.

Spreadsheet

You can also display all the gathered compensation data from Human Resources in a spreadsheet to view in Microsoft Excel. For North American Payroll, the extract to Excel process retrieves data from the TC warehouse. If Payroll data is in the TC warehouse it will be extracted to Excel.

OLAP Analysis Models (Cubes)

Very often, having a quantitative view of compensation is not enough to make a good business decision. An HR manager often needs to see how compensation is dispersed and if the outstanding figures for a given department are due to a particularly high average salary or to an outstanding headcount and Full Time Equivalent (FTE). OLAP analysis models offer a very powerful solution for performing online analytical processing of your multidimensional total compensation data.

PeopleSoft HRMS provides you with Cognos PowerPlay, an OLAP tool, so that you can analyze the cubes without having to purchase additional software.

The OLAP structure is formed in a cube. With these cubes, you can view and store multiple models of compensation for your organization. For example, you might decide you want to look at base salary and benefits estimates from PeopleSoft Human Resources and analyze them by business unit, department, employee, and time. You can process as many cubes as necessary to fully analyze your data.

A cube's structure is referred to as an *instance.* PeopleSoft provides you with two pre-defined cube instances to use so that you don't need to design a cube in order to take advantage of OLAP processing. The two pre-defined cubes are the Compensation cube and the Headcount/FTE cube. They have many of the same dimensions such as jobcode, position, and salary level, so that you can use the cubes together for analysis. This is called drilling through from one cube to another.

This document assumes you are familiar with the OLAP concepts and terminology discussed in Introduction to Cube Manager.

Understanding the Reporting Process

Regardless of the result you want, you must set up a reporting structure for your data. This reporting structure determines how the reporting results appear. PeopleSoft provides pre-defined values for most of the reporting structure components. You will most likely alter a few pre-defined attributes, but it's still a good idea to understand the entire reporting process to ensure you get the results you want.

The following illustration shows an overview of the PeopleSoft Reporting Total Compensation process:

```
  ┌──────────────────────┐      ┌──────────────────────┐
  │   PeopleSoft HRMS:   │      │ PeopleSoft NA Payroll:│
  │  Benefits/Deductions │      │  Benefits/Deductions │
  │       Earnings       │      │       Earnings       │
  │ Variable Compensation│      │        Taxes         │
  └──────────────────────┘      └──────────────────────┘
```

Define Reporting
Structure (Data
Warehouse)

Cubes

Reports

Inquiry
Pages

HR data in
Excel
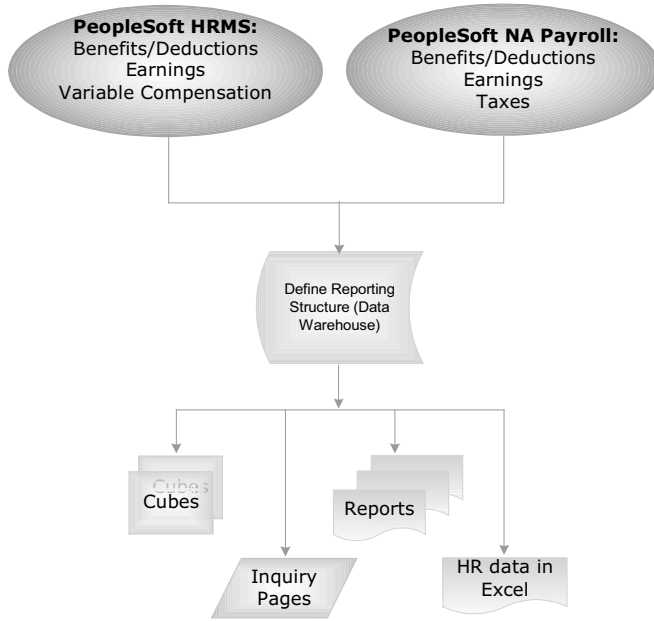
Overview of the Reporting process

Process Sequence

There are a several steps you need to perform in order to obtain the reporting results. Many of the steps consist of setting up the reporting structure. However, PeopleSoft HRMS has pre-defined many of this module's components, so your actual tasks are kept to a minimum.

The following flow chart illustrates how the different steps you'll perform all work toward defining the results. The first step, setting up a reporting structure, you'll perform once and change occasionally. The other steps you may perform repeatedly to meet your reporting needs.
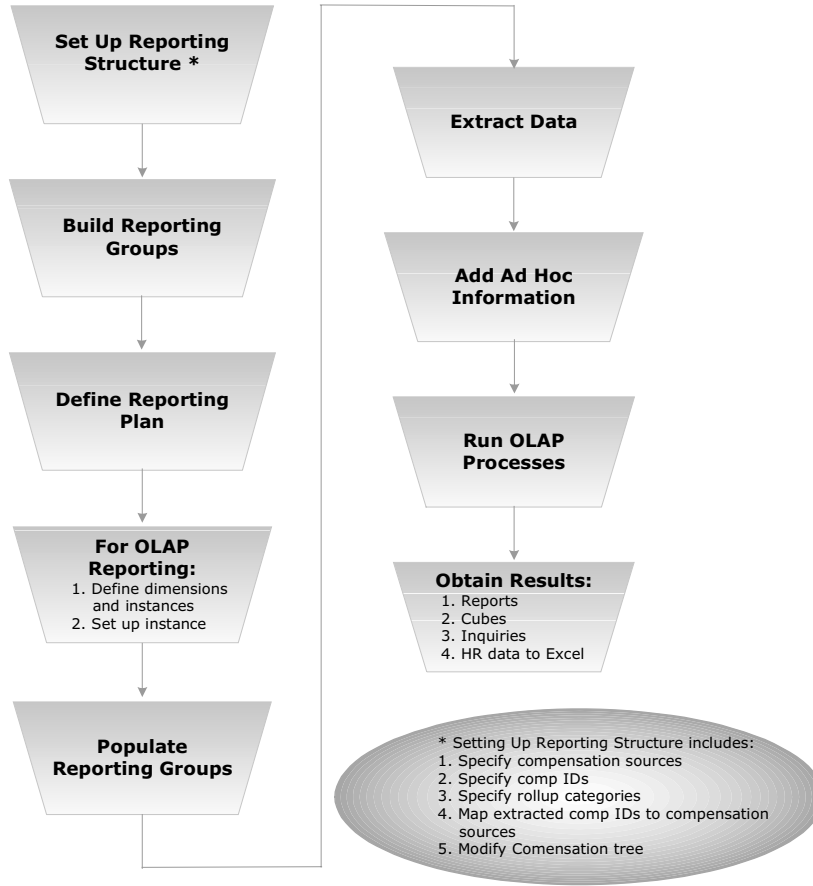
Process sequence

Compensation Tree

The data warehouse stores the data it collects based on the structure of the Compensation tree. PeopleSoft provides a Compensation tree that you'll alter to reflect the needs of your company. You'll change the tree structure before data collection begins.

For the PeopleSoft Reporting Total Compensation module, you have to look at trees a bit differently than other PeopleTool trees. In this module, you first define the leaves and nodes of the tree and then you define the tree. The Trees in the Total Compensation module differ from the other trees in the sense that they use a dedicated Tree Structure. But, you are not forced to the leaves of the tree in the beginning. Roll-up categories and compensation ids can be defined when building the tree. The tree nodes are called *rollup categories*, and the tree leaves are called *compensation IDs*, or comp IDs.

```
TOTALCOMP              tree name
   01/01/1900
      CATEGORY 1       node
         COMPID 1          leaf
         COMPID 2          leaf
      CATEGORY 2       node
         COMPID 3          leaf
      CATEGORY 3       node
         COMPID 4          leaf
         COMPID 5          leaf
```

Reporting Total Compensation tree structure

📝 All pre-defined Total Compensation components, such as trees, queries, and cube
dimensions, begin with *TC_* (for example: the dimension *TC_Company*).

Compensation IDs and Their Sources

The compensation IDs, or comp IDs, are the elementary pieces of the reporting module. Each
comp ID represents a figure reported in the results. Comp IDs are the leaves on the
Compensation tree. The following explanation about comp IDs may seem a bit complicated, but
having comp IDs enables the PeopleSoft Reporting Total Compensation module to gather data in
the same way, for any type of result.

PeopleSoft HRMS supplies predefined comp IDs. You will probably add comp IDs only for ad
hoc awards.

Comp IDs are compensation elements such as components of pay, variable compensation awards,
or benefit amounts. The comp IDs are mapped to their 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 source.

In an extreme example, there is just one comp ID that contains components from all the possible
sources. You would have to map that comp ID to each source so that the module gathers all the
data you want included in the results. This scenario is highly unlikely as the results would include
just one figure.

Possible sources for comp IDs are North American Payroll and PeopleSoft HRMS: benefits, base
pay (regular pay from the Multiple Components of Pay module, stored in the Job and
Compensation records), and incentives and ad hoc payments from the Variable Compensation
module.

The following diagram illustrates how comp IDs are mapped to their sources:
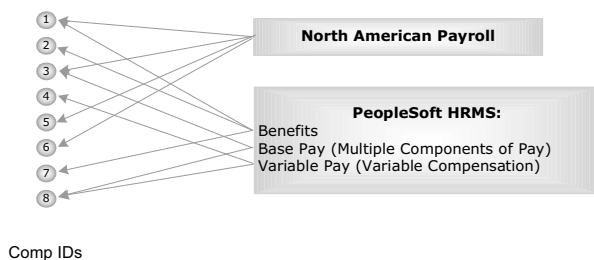
Comp IDs and their sources

Time Periods

You're going to define a time period from which you want information gathered using standard From and Thru Date fields. You're also going to specify a period frequency, which represents how many times within the period you want the module to calculate total compensation amounts. You can specify a period frequency as monthly, quarterly, or annually. All the time periods are defined when you set up the Total Compensation Reporting Plans.

For example, if you select quarterly as the period frequency, and 01/01/1997 and 12/31/1997 as the From and Thru Dates, the module extracts data four times for 1997: 03/01/1997, 06/01/1997, 09/01/1997 and 12/01/1997. If you specified 01/01/1997 and 12/31/1998 as your From and Thru Dates, the module extracts data eight times because there are eight quarters within the specified two-year time period.

For OLAP users, this value also represents how low a level you want to navigate into the cube.

Your report data is more accurate when you specify the module to extract data more often. For example, within a one-year period, a monthly extraction (12 times) is more accurate than an annual one (once). However, the processing time such accurate reports require can be substantial, so you must explore the processing capacity of your hardware.

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

You can have one reporting plan with several different From and Thru Dates. However, when you go to run the extraction process, you can always specify a sub-set of the plan's From and Thru Dates. For example, plan number seven has a From and Thru Date of two years. When you run the extraction process, you can specify that plan number seven run for just one year.

Preventing Double Accounting

Theoretically, there are two instances that the reporting module can count compensation values more than once. This double accounting is obviously something to avoid, as you'll never obtain accurate results. Safeguards in PeopleSoft HRMS greatly reduce the possibility of double accounting.

The first instance of possible double accounting occurs because of the nature of using groups. You'll specify in reporting groups the people whom you want reported. You must ensure that a person is not in more than one group. If a person is in more than one group, that person's total compensation is counted each time the module encounters him or her in a group. You'll have to run the Group Overlapping Report to prevent the possibility for double accounting.

For more information about Group Build, see Working With Groups.

To prevent another possibility of double accounting, you'll specify whether a comp ID is either a compensation amount or a payroll amount. You'll define the amount type when you define the comp ID. The extract processes use this attribute to store compensation IDs in separate fields in the Compensation warehouse: compensation and payroll fields. In addition, both compensation amounts and payroll amounts are stored as separate measures in OLAP. This way, you ensure that all along the process, compensation data coming from HRMS is not aggregated with Payroll data.

Before You Begin

The PeopleSoft Reporting Total Compensation module relies on your familiarity with several other PeopleSoft concepts and tools. Before you being performing any of the setup steps, you should familiarize yourself with these tools:

- Cube Manager: Cube Manager integrates with two third-party OLAP tools: Arbor Essbase and Cognos PowerPlay. PeopleSoft HRMS ships with Cognos PowerPlay.

For more information about Cube Manager, see Introduction to Cube Manager.

- Tree Manager: You need to use Tree Manager to modify a few trees.

For more information about Tree Manager, see Tree Manager.

- Process Scheduler: You need Process Scheduler to process the extracts and run the reports and cubes.

For more information about Process Scheduler, see Process Scheduler.

- Group Build feature: You need the Group Build feature to build reporting groups.

For more information about Group Build, see Working With Groups.

- Variable Compensation module: You need to be familiar with the Variable Compensation module.

  It is important to retrieve the information from various other PeopleSoft applications. To ensure that the Total Compensation Reporting module retrieves the data that you want from the Variable Compensation module, you may have to look into how data is set up the Variable Compensation module.

For more information about data from the Variable Compensation module, see Determining Allocations for Total Compensation Reporting. For more information about Variable Compensation, see Managing Variable Compensation.

- Multiple Components of Pay module: You need to be familiar with the Multiple Components of Pay module.

For more information about Multiple Components of Pay, see Working with Multiple Components of Pay.

C H A P T E R 2

Setting Up the Total Compensation Reporting Structure

After reading Chapter 1, you should have an understanding of how the components of the PeopleSoft Reporting Total Compensation module build on each other to create the reporting results. The first actual task for you to perform is to set up the reporting structure because this determines how the reports and cubes are displayed. This chapter discusses each step in setting up the reporting structure.

Defining Rollup Categories

Total Compensation rollup categories group the comp IDs together in the Compensation tree. They are a key element in the reporting structure since they define how the compensation data is organized and rolled up, which in turn determines the structure of the results.

You must define the nodes and leaves of your Compensation tree first, and then define the tree. It is possible to define Compensation IDs and Roll-up Categories as you build the TC Tree. Total Compensation rollup categories are the nodes of your Total Compensation tree. The following table lists the predefined rollup categories for the Compensation tree. Select or modify these categories, or create your own categories that reflect the compensation plan for your organization.

You can have as many categories as you like. The more categories you have, the more the results accurately reflect your compensation.

If you add a category with the Rollup Category page, use Tree Manager to add it to the Compensation tree.

PeopleSoft Predefined Rollup Categories

The predefined rollup categories for the Compensation tree are listed in the following table:

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 rollup	LTD	Long Term Disability

Category Name	Description	Category Name	Description
BCBS	Blue Cross Medical	MEDICAL	Medical
BENEFITS	Benefits Compensation rollup	OTHER	Other Compensation
DENTAL	Dental Benefits Programs	PAIDTMOFF	Paid Time Off
DEP-LIFE	Dependent Life Insurance	PROGCRD	Benefit Program Credit
DISABILITY	Disability	SAVINGS	Savings Plan
EARNINGS	General Earnings rollup	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 rollup
HEALTH	Health Benefit Plans rollup	VACATION	Vacation Leave Plan
INCENTIVE	Incentive Pay	VISION	Vision Plan

Rollup Category Page

Usage	Use the TC Category page to define additional rollup categories for the Compensation tree. Remember to add the new categories to the Compensation tree with Tree Manager.
Object Name	TC_CATEGORY
Navigation	**Compensate Employees, Report Total Compensation, Setup, Rollup Category, TC Category**
Prerequisites	None
Access Requirements	Enter a category name.

TC Category (total compensation category) page

Category	The **Category** you entered is displayed.
Description	Enter a **Description** of the **Category.**
Comments	Enter any **Comments.**

Defining Compensation Sources

PeopleSoft HRMS has already associated a predefined set of compensation sources with the extraction programs needed to retrieve the data. You will run the extract processes to populate the data warehouse. The way in which the sources are mapped will determine which extracts run. For example, benefits data is mapped to benefits and deductions.

Most likely, you'll only use the Compensation Source page for ad hoc awards. For ad hoc awards, you need to specify that the source is ad hoc because this tells the module that no extraction is necessary for these awards. You'll enter in any amounts by using the Ad Hoc pages; the data is then directly entered into the data warehouse.

PeopleSoft Predefined Compensation Sources

The predefined compensation sources are listed in the following table. Included are each source's associated extract program and map.

Do not modify the predefined compensation sources. PeopleSoft cannot guarantee any results from modified compensation sources.

Comp Source	Source Application	Source Type	Extract Program	Mapping
BENEFITS	PeopleSoft Benefits	Extract	HR_TCBENEF	Benefits and Deductions
COMP	PeopleSoft Human Resources	Extract	HR_TCMCOMP	Components of Pay are extracted and must be mapped to Compensation IDs using the delivered mapping MCOMP.
VARCOMP	PeopleSoft Human Resources	Extract	HR_TCVCOMP	Earnings and VarComp Programs
PAYDEDUCT	PeopleSoft Payroll for North America	Extract	HR_TCPYDED	Benefits and Deductions
PAYEARNS	PeopleSoft Payroll for North America	Extract	HR_TCPYERN	Earnings
PAYTAX_CAN	PeopleSoft Payroll for North America	Extract	HR_TCPYTAX	Taxes - Canada
PAYTAX_US	PeopleSoft Payroll for North America	Extract	HR_TCPYTAX	Taxes - USA

Compensation Source Page

Usage	Use this page to define additional sources of Total Compensation data, such as ad hoc employee or ad hoc organization awards. Do not modify any existing sources.
Object Name	TC_COMPSOURCE
Navigation	**Compensate Employees, Report Total Compensation, Setup, Compensation Source, Comp Source**
Prerequisites	None
Access Requirements	Enter a new compensation source.

Compensation Source page

Comp Source	The **Comp Source** (compensation source) that you entered is displayed.
Description	Enter a **Description** of the compensation source.
Source Type	Select a **Source Type** from the list of translate values. The predefined compensation sources delivered with the system are identified as *Extracts* because they are mapped to Application Engine extract programs.
	If you are adding compensation sources for ad hoc employee or organizational rewards, select *Ad-Hoc Emp* or *Ad-Hoc Org.* The data from these sources is directly entered into the data warehouse and won't need to be extracted.
Amount Type	Select either *Comp Amt* (compensation amount) or *Payroll Amt* (payroll amount). The **Amount Type** that you select is based on the **Source Type**. If you've selected *Payroll* as the Source Type, select *Payroll Amt.* For the other extracts, select *Comp Amt.* The amount type is used to ensure that there is no double accounting between the compensation amounts extracted from HR and the payroll amounts.
Extract Program	**Extract Program** is normally unavailable for selection. Ad hoc entries don't need extractions.
	When you select *Extract* for the **Source Type,** the **Extract Program** field becomes active. You have already defined the **Extract Program** name for each predefined compensation source. The **Extract Program** name is really the name of the Application Engine extract process that extracts data from your PeopleSoft HRMS system and places that data in the warehouse.

Map Based On	If you entered a **Source Type** of *Ad Hoc Emp* or *Ad Hoc Org,* then indicate *No Mapping.*
	The mapping is where you make the link between Components of Pay and Compensation IDs for the Base Pay extract and between Variable Compensation Awards and Compensation IDs for the Variable Compensation extract. The table in PeopleSoft Predefined Compensation Sources indicates the mapping for the predefined sources.
Comment	Enter any **Comments.**

Defining Compensation IDs and Mapping Extract Data

Comp IDs (compensation IDs) are the elementary pieces of the Total Compensation reporting structure. Comp IDs are the leaves on your Compensation tree. Most likely, there are many comp IDs that make up your company's Compensation tree.

Predefined comp IDs are provided for you. You'll need to modify these or create new ones to fit your company's Compensation tree.

If you're adding ad hoc employee or organization awards, you'll need to create comp IDs for those awards.

As discussed in Defining Compensation Sources, you must associate new comp IDs with both their compensation sources and the extract process that retrieves the data from the source.

To Define comp IDs:

1. Determine which predefined comp IDs you need to modify to fit your tree.

2. Use the Tc Comp Defn and Tc Comp Map pages to modify the comp IDs.

3. If you are adding ad hoc employee or organization awards, create new comp IDs. Remember, no mapping is necessary for ad hoc data because data is placed directly into the data warehouse; no extraction is necessary.

PeopleSoft Predefined Comp IDs

The predefined comp IDs are listed in the following table. Their mapping is also listed.

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

Comp ID	Mapping (Sources)	Comp ID	Mapping (Sources)
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
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
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

Comp ID	Mapping (Sources)	Comp ID	Mapping (Sources)
SAV-ER-AT	Benefits and Deductions	INCENTIVE	Var Comp
SAV-ER-BT	Benefits and Deductions		

Compensation Definition Page

Usage	Use the Tc Comp Defn (Total Compensation Definition) page to add or modify comp IDs.
Object Name	TC_COMP_DEFN
Navigation	**Compensate Employees, Report Total Compensation, Setup, Compensation, Compensation Definition**
Prerequisites	None
Access Requirements	Enter a comp ID.

Compensation Definition page

Comp ID   The **Comp ID** that you entered is displayed.

Description   Enter a description of the **Comp ID.**

Compensation Type	Indicate the **Compensation Type** by selecting from the list of translate values.
	Direct compensation is cash payments made to employees in exchange for their contributions to the organization such as base pay, shift differentials, profit sharing, incentive pay, and bonuses.
	Indirect compensation is non-cash compensation awarded to employees in exchange for their contributions to the organization. *Indirect* compensation includes things such as company-paid medical, dental, vision, disability, life insurance, holiday leave, vacation leave, sick leave, and employee services and perquisites (club memberships, parking, holiday gifts).
Organizational Cost	Specify if the **Organizational Cost** is employer paid or employee paid. By distinguishing between employer paid costs and employee paid costs, the costs are not counted twice in the Employee Benefits statement.
	Enter *Yes* when the cost is employer paid. Enter *No* when the cost is employee paid. When you enter *No,* the system does not sum organizational costs.
EE (Employee) **Compensation Total**	Select *Yes* or *No* to indicate whether the system should calculate the **Comp ID** value as part of the **EE Compensation Total.**
	Selecting *Yes* indicates that the **Comp ID** is considered part of the employee's Total Compensation. Selecting *No* indicates that the **Comp ID** is not part of the employee's Total Compensation, but it is still a cost that you want to track.
Comment	Enter any **Comments.**

Compensation Mapping Page

Usage	Use the Total Compensation Mapping page to map new Comp IDs to their compensation sources. All comp IDs provided by PeopleSoft are already mapped to their respective sources. Ad hoc awards need no mapping.
Object Name	TC_COMP_MAP
Navigation	**Compensate Employees, Report Total Compensation, Setup, Compensation, Compensation Mapping**
Prerequisites	None

Access Requirements	Enter a comp ID.

Compensation Mapping page

Comp ID	The **Comp ID** that you specified is displayed.
Mapping	Select a value from the translate list. Valid values are ***Ben/Deduct, CAN Taxes, Earnings, MCOMP, No Mapping, USA Taxes, VComp.*** See the table in the following section, Compensation Mapping Pages.

The value that you select determines which extraction program retrieves the specified **Comp ID.** For example, you cannot specify ***Earnings*** and expect benefits data in the results.

For Ad hoc comp IDs, select ***No Mapping.*** |
Comp Source	Select a **Comp Source** from the translate list. The available values are limited based on the **Mapping** value selected.
Description	The **Description** is displayed.
Amount Type	The **Amount Type** is displayed. The available values are limited based on the **Comp Source** selected.
Go To Mapping	Click the **Go To Mapping** link to access the various pages where you can view or modify further details about what the extraction program retrieves (specified by the value in the **Mapping** field).

Compensation Mapping Pages

There are six pages to accommodate the six possible compensation sources. The following table lists the mapping field values and their associated pages:

Mapping Field Value	*Compensation Mapping Page*
Ben/Deduct	Benefits Mapping

Mapping Field Value	Compensation Mapping Page
CAN Taxes	Canadian Taxes Mapping
Earnings	Earning Mapping
MCOMP	Multiple Components of Pay mapping
No Mapping	No Mapping
USA Taxes	US Taxes Mapping
VComp	Variable Compensation Mapping

Benefits Mapping Page

Usage	Use the Benefits Mapping page to select what information about benefits and deductions you want extracted into the warehouse as part of this comp ID.
Object Name	TC_MAP_BENEFIT_SEC
Navigation	Click the **Go To Mapping** link on the Compensation Mapping page.
Access Requirements	Select Ben/Deduct in the Mapping field on the Compensation Mapping page.

Benefits and Deduction Mapping

Benefits Mapping   View All   First ◀ 1 of 1 ▶ Last

Plan Type	Benefit Plan	Deduction Classification	Sales Tax Type	Deduction Code	Description	Cost Type
401(k)	KU401	Before-Tax	B	KU401K	401(k)	+ −

Benefits Mapping page

Plan Type   Select the **Plan Type** from the list of prompt values. The values come from the Benefits Plan table. To include multiple **Plan Types,** insert additional rows.

Benefit Plan   Select the **Benefit Plan** within this **Plan Type** from the list of prompt values. The values come from the Benefit/Deduction Program table.

Deduction Classification   Select the **Deduction Classification** for the **Benefit Plan** from the list of prompt values. The values come from the Deduction table.

Sales Tax Type   Select the **Sales Tax Type** for the **Benefit Plan** from the list of translate values.

Deduction Code   Select the **Deduction Code** for the **Benefit Plan** from the
                                 list of prompt values. The values come from the
                                 Deduction table.

Description   When you press TAB to move through the **Deduction
                                 Code** field, its **Description** is displayed.

Cost Type   Select *Credit* or *Price* for the **Cost Type**.

Canadian Taxes Mapping Page

| Usage	Use the Canadian Taxes Mapping page to select what information about the Canadian taxes you want extracted into the warehouse as part of this comp ID.
Object Name	TC_MAP_TAX_CAN_SEC
Navigation	Click the **Go To Mapping** link on the Compensation Mapping page.
Access Requirements	Select CAN Taxes in the Mapping field on the Compensation Mapping page.
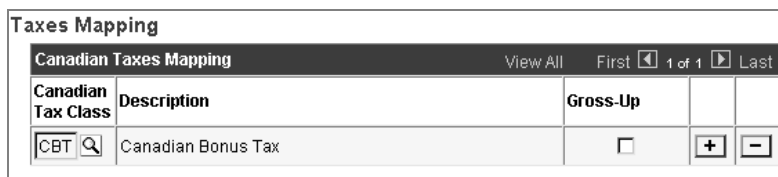
Canadian Taxes Mapping page

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

Description   When you press TAB to move through the **Canadian Tax
                                Class** field, its **Description** is displayed.

Gross-Up   Select the **Gross-Up** check box if your company pays the
                                taxes for the employees on this **Canadian Tax Class,** and
                                you want that amount to be extracted into your data
                                warehouse.

Earnings Code Mapping page

Usage	Use the Earnings Mapping page to select what information about earnings that you want extracted into the warehouse as part of this comp ID.
Object Name	TC_MAP_EARN_SEC
Navigation	Click the **Go To Mapping** link on the Compensation Mapping page.

Access Requirements	Select Earnings in the Mapping field on the Compensation Mapping page.
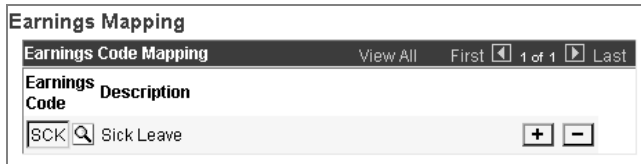
Earnings Code Mapping page

Earnings Code	Select the **Earnings Code** from the list of prompt values. The values come from the Earnings Code table. To map to multiple **Earnings Codes,** insert additional rows.
Description	When you press TAB to move through the **Earnings Code** field, its **Description** is displayed.

Multiple Components Mapping Page

Usage	Use the Multiple Components of Pay Mapping page to select what information about multiple components of pay you want extracted into the warehouse as part of this comp ID.
Object Name	TC_MAP_MCOMP_SEC
Navigation	Click the **Go To Mapping** link on the Compensation Mapping page.
Access Requirements	Select MCOMP in the Mapping field on the Compensation Mapping page.
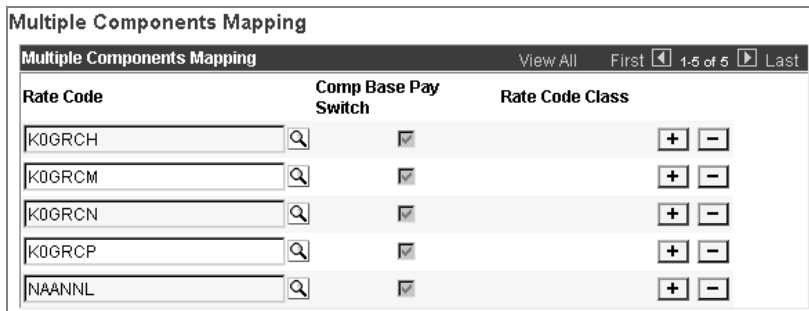
Multiple Components Mapping page

Rate Code	Select a valid **Rate Code** from the list of translate values.
Comp Base Pay Switch	When a **Rate Code** is entered, the **Comp Base Pay Switch** is displayed. The **Comp Base Switch** indicates if a component of pay is included in the Base Pay calculation for an employee. For more information refer to your Multiple Components of Pay documentation.

> For more information, see PeopleSoft 8 Application Fundamentals for HRMS, "Working with Multiple Components of Pay".

Rate Code Class   The **Rate Code Class** associated with the **Rate Code** displays. The **Rate Code Class** displays only when the **Rate Code** is entered.

Variable Compensation Mapping Page

Usage	Use the Variable Compensation Mapping page to select what information about variable compensation plans you want extracted into the warehouse as part of this comp ID.
Object Name	TC_MAP_VCOMP_SEC
Navigation	Click the **Go To Mapping** link on the Compensation Mapping page.
Access Requirements	Select Vcomp in the Mapping field on the Compensation Mapping page.

Variable Compensation Mapping page

VC Plan ID   Select the **VC Plan ID** from the list of prompt values. The values come from the Variable Compensation Plan table.

Description   When you press TAB to move through the **VC Plan ID** field, its **Description** is displayed. To map to multiple VC Plan IDs, insert additional rows.

U.S. Taxes Mapping Page

Usage	Use the USA Tax Mapping page to select what information about USA taxes you want extracted into the warehouse as part of this comp ID.
Object Name	TC_MAP_TAX_SEC
Navigation	Click the **Go To Mapping** link on the Compensation Mapping page.
Access Requirements	Select USA Taxes in the Mapping field on the Compensation Mapping page.

U.S. Taxes Mapping page

|	
Tax Class	Select the **Tax Class** from the list of translate values. To map to multiple **Tax Classes,** insert additional rows.
Description	When you press TAB to move through the **Tax Class** field, its **Description** is displayed.
Gross-Up	Select the **Gross-Up** check box if your company pays the taxes for the employees on this **Tax Class,** and you want that amount to be extracted into your data warehouse.

Setting Up the Compensation Tree

PeopleSoft HRMS comes with a predefined Compensation tree. You've already defined the nodes and leaves of the Compensation tree. Now, you'll probably want to modify the tree to reflect your organization's needs.

Use PeopleTools Tree Manager to manipulate the tree. It is important to remember that the Compensation tree dictates the structure of the data warehouse and the way data is rolled-up.

You need to set up your Tree—arrange the Compensation IDs and Roll-up categories—before you can actually run any of the extraction the programs. If you do not, the joins will fail and no data is extracted from the warehouse.

The following illustration shows the predefined sample tree:
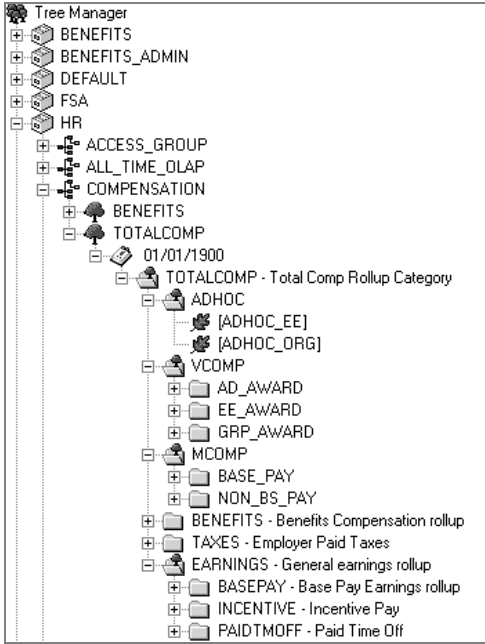
Compensation tree

ℹ️   For more information about trees, see Tree Manager.

C H A P T E R 3

Defining Reporting Groups

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

Because of your specific compensation reporting needs, the groups you build for PeopleSoft Reporting Total Compensation will most likely be different from any group that you build throughout PeopleSoft HRMS. For clarity, we'll call these groups reporting groups. For example, a compensation manager may want a report on her company's two industries. The manager would set up the 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

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 rollup structure of the Compensation tree. You can avoid this by running the Group Build Overlapping Groups report on the reporting groups.

To build a reporting group:

1. Use the Group Build feature to build as many groups as you need. **Define Business Rules, Manage Human Resources, Setup, Group Definition.**

2. To ensure that the populations in your groups don't overlap, use the Group Member Overlap report.

3. You will use the groups in the Setting Up Total Compensation Reporting Plans chapter.

For more information about building groups, see Working With Groups.

Setting Up Total Compensation Reporting Plans

Creating a reporting plan enables you to set certain parameters for the extraction processes so that only data within those parameters is extracted when you run the processes. You set these parameters with a reporting plan:

- A time interval for data extraction.

- A period frequency for the calculations.

- One single currency. The application converts any figures to this currency.

- The employees to include by group.

- The Compensation tree to use for the report.

Reporting Plan Time Periods

There are a few date fields on the Reporting Plan Definition page that should be discussed before you set up a plan. The first is Effective Date. The Effective Date is simply the date when this reporting plan is accurate. Because the Plan ID and the Effective Date are composite key fields, you can have one plan with several different Effective Dates.

Period Frequency

The Period Frequency represents the plan's smallest measure of time for analysis. The value you select indicates how often the data is extracted during the Period you specify in the From Date and Thru Date fields. The three Period Frequency values are *Annually, Quarterly,* and *Monthly*.

For example, if you select *Quarterly* as the Period Frequency, and *01/01/1997* and *12/31/1997* as the From and Thru Dates, the module extracts data four times for 1997: 03/01/1997, 06/01/1997, 09/01/1997 and 12/01/1997. If you specified *01/01/1997* and *12/31/1998* as your From and Thru Dates, the module extracts data eight times because there are eight quarters within the specified two-year time period.

For OLAP users, this value also represents how low a level you want to navigate into the cube.

📝   Your report data is more accurate when you specify the module to extract data more often. For example, within a one-year period, a monthly extraction (12 times) is more accurate than an annual one (once). However, the processing time such accurate reports require can be substantial, so you must explore the processing capacity of your hardware.

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

You can have one reporting plan with several different From and Thru Dates. However, when you go to run the extraction process, you can always specify a subset of the plan's From and Thru Dates. For example, plan number seven has a From and Thru Date of one year. When you run the extraction process, you can specify that plan number seven run for just half of a year.

Reporting Plan - Definition Page

Usage	Use this page to create, review, or update a reporting plan. Define the Total Compensation reporting plan by specifying the time interval for which you want to extract data and specify the currency and rate type.
Object Name	TC_PLAN
Navigation	**Compensate Employees, Report Total Compensation, Setup, Reporting Plan, Definition**
Prerequisites	None
Access Requirements	Enter the TC Plan ID.

Reporting Plan - Definition page

TC Plan ID (total compensation plan ID)	The name of the **TC Plan ID** that you entered is displayed.

Effective Date   Enter an **Effective Date** for your reporting plan. You can specify more than one **Effective Date** for a plan.

Plan Name   Enter a **Plan Name.**

Comments   Enter any **Comments.**

Period Frequency   Select a **Period Frequency** for the plan: *Annually, Monthly,* or *Quarterly.* The **Period Frequency** is the frequency of calculation, determining how often compensation is extracted and calculated. For OLAP users, this value also represents how low a level you want to navigate into the cube.

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

Thru Date   Enter the inclusive **Thru Date.** The extraction process retrieves data dated on or before this date. If you enter any date greater than 28 for a month, the module assumes you want the end of the month and changes the date to the end of the month.

Frozen   The Frozen option buttons represent the status of the reporting plan.

                            The reporting plan status is **Frozen** (*No*), or not frozen, while you create the plan definition and before any extracts have occurred. When the plan status is **Frozen** (*No*), the interval dates and Group ID fields in this page group are available for data entry or modification.

                            As soon as you run the extracts, the reporting plan status changes to **Frozen** (*Yes*). You may not modify the interval dates or any of the Group ID fields. However, you can add additional compensation definitions using the Tree you specify for that plan and extracts to the plan. When all extracts are complete, you cannot add any ad hoc compensation, and recalculations are not allowed.

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

Cur Effdt (currency effective date)	Select the **Cur Effdt** that you want the system to use in order to calculate the exchange rate. Use either the plan's **Thru Date,** or the plan's **Efftd** (effective date). The system gives you the choice of setting the exchange rate used for any currency conversion as of the plan **Thru Date** (in **Cur Effdt** group box) or at any date (**Effdt** option in the **Curr Effdt** group box). If you select **Thru Date,** the **Curr Rate Effdt** is not available for use. If you select **Effdt**, you can enter a date in **Curr Rate Effdt.**
Currency Code	Select a value from the list of prompt values. All currency in the data warehouse is converted to the currency that you select here upon data extraction. The values come from the Currency Code table.
Rate Type	Select a value from the list of prompt values. The values come from the Currency Rate Type table. Valid rate types include *Commercial, Financial, Floating, Official, Free Market,* and *Spot Market.* For consistency in the results, the Rate Type that you select here should be the same one that you specify throughout the PeopleSoft HRMS application.
Cur Rate Efftd (currency rate effective date)	Enter the **Cur Rate Effdt.** The system looks in the Currency Rate table and uses the currency exchange rate with an effective date closest to but less than the **Cur Rate Effdt** that you enter here or closest to but less than the Thru Date of the plan if the **Thru Date** option is selected.

In order for your extract to run, every base currency specified on the Reporting Plan Definition page must be mapped to any other currencies used in the data sources on which you run your extract processes. For example, if an employee is set up in Job with a monthly salary of USD 3000, and another employee in the system has a monthly salary of CAD 5000, you must map both currencies to each other. Map the currencies at **Go, Define Business Rules, Define General Options, Setup, Market Rates.**

Reporting Plan – Tc Plan Group Page

Usage	Use the Reporting Plan - Tc Plan Group page to associate a tree and group IDs to a reporting plan.
Object Name	TC_PLAN_GRP

Navigation	**Compensate Employees, Report Total Compensation, Setup, Reporting Plan, Tc Plan Group**
Access Requirements	Enter the TC Plan ID.

Reporting Plan – TC Plan Group page

TC Plan ID   The **TC Plan ID** that you entered is displayed.

Effective Date   The value from the Reporting Plan Definition page is displayed.

Tree Name   Select the Compensation tree from the list of prompt values from the PSTREEDEFN table. You can only select from compensation trees that have a Structure ID of *Compensation*.

Group ID   Select groups from the list of translate values.

                          Add as many groups as needed for this plan. Make sure that an individual isn't in more than one group. See Defining Reporting Groups.

Description   The system populates the **Description** field when you press TAB to move out of the **Group ID** field.

C H A P T E R 5

Setting Up the OLAP Cubes

You've done most of the preparation for using cubes in the preceding chapters. There are just a few more cube-related steps to perform before you run the extracts that will fill the warehouse. After you perform the steps in this chapter and the ones in Populating Reporting Groups and Extracting Total Compensation Data, then you can process the cubes.

To set up the Reporting Total Compensation cubes:

1. Familiarize yourself with the dimensions of both the Compensation and Headcount/FTE cubes.

2. Make a department tree from your Security Department tree.

3. Copy/create the ALL_TIME tree.

📝   The PeopleTools Cube Manager is designed to be OLAP platform independent and integrate with both Cognos PowerPlay and Arbor Essbase. The Compensation cube and Headcount/FTE cube are designed for use with PowerPlay. A limited license copy of PowerPlay is delivered with your PeopleSoft HRMS system.

The next section gives a brief discussion of OLAP reporting; however, it assumes that you've read the Cube Manager in PeopleTools.

Overview of OLAP Reporting

Total compensation data can be detailed and complex, but sophisticated tools can help you perform meaningful comparison and analysis. The most powerful of these tools provides online information access and is known as Online Analytical Processing (OLAP). OLAP reporting not only enables you to view compensation data from a variety of axis points; it also enables you to move easily from one view to another.

Besides providing online capabilities, OLAP tools also help you look at your data from many different perspectives and dimensions, which is why OLAP is often referred to as multidimensional analysis. You identify the dimensions (attributes) of the data and then combine the dimensions in various ways. For example, when you analyze total compensation data, you probably want to look at it from several perspectives: department, jobcode, and time.

You might think of a dimension as the columns or rows on a spreadsheet. However, since a spreadsheet is only two dimensional, it would be difficult to represent departments, jobcodes, and time using a single spreadsheet. Therefore, when data has three or more dimensions, it's more descriptive to think of a cube, with each side representing a dimension, as shown in the following diagram:
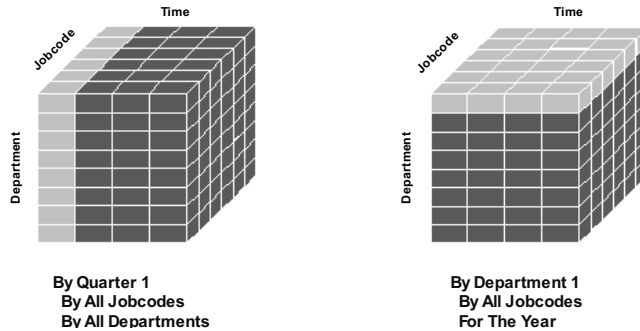
Representational Total Compensation cube and dimensions

Once you've defined an OLAP cube, you can view your data from different perspectives, or *slice and dice* the data based on combinations of these dimensions. For example, you could examine the total compensation data for the Training Department of the Western Region for the entire year. When you analyze the data, you *slice* off part of the cube or *dice* it to get to an individual cell. These multidimensional views of your total compensation data provide valuable information for effective data analysis, decision-making, and forecasting.

PeopleSoft Predefined Dimensions and Measures

The following table lists the Total Compensation dimensions provided with PeopleSoft HRMS. Most of the dimensions are in both the Compensation and Headcount/FTE cubes.

The measures for the Compensation cube are Compensation Amount and Payroll Amount. When you defined compensation sources in Chapter 2, you specified either Comp Amt (compensation amount) or Payroll Amt (payroll amount) as the Amount Type. 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.

Use the Cube Manager to view details of the dimensions and measures.

Dimension	In Which Cubes?	Rollup Type	Comments
TC_BUS_UNIT	Both	Query	This 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	This query retrieves the Employees 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 in Setting Up the Total Compensation Reporting Structure.
TC_DEPT	Both	Tree	You'll duplicate your organization's department security tree to make a tree. TC_DEPT trees are copies of standard Department trees in which the department IDs are the concatenation of the SetID with the standard Dept ID. For instance, Department 10001 on the US department Tree would be Department USA10001 in the related TC Department tree.
TC_EE_COMPTOTAL	Compensation	Query	This query finds whether you've specified that the comp ID be included in the compensation total or not. You specified this in the EE Comp Total field on the Compensation Definition page.
TC_JOBCODE	Both	Query	Grouped by job function and JobCode. You usually won't alter the query.

Dimension	In Which Cubes?	Rollup Type	Comments
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	You'll modify this query to match the ALL_TIME tree.
TC_TYPE	Compensation	Query	This query finds whether you've specified that the comp ID is employee paid or employer paid. You specified this in the Organizational Cost field on the Compensation Definition page.

Creating the Total Compensation Department Tree

You may need a department dimension in your cube so that you can analyze results by department. PeopleSoft HRMS 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 Department Tree page. This is a mandatory step.

Department Tree Page

Usage	Use this page to duplicate your Security tree to create a Department tree. The new tree is named TC_DEPT and appears with the other HR trees in Tree Manager.
Object Name	TC_DEPT_TREE
Navigation	**Compensate Employees, Report Total Compensation, Setup, Department Tree, TC Department Tree**
Prerequisites	You must have a valid Dept_Security tree.
Access Requirements	None

Department Tree page

Tree Name   Select the name of your Department Security tree.

As Of Date   Select the **As Of Date** for the tree.

Create Dept Tree (create   Click this button when you want to create the tree. The
department tree)   tree appears with the other HR trees in Tree Manager.

Filling in the All_TIME Tree

PeopleSoft HRMS provides the skeleton ALL_TIME tree, which represents the time dimension
for your cubes. Use Tree Manager to construct the tree to meet your needs and to define how
Time Periods roll-up. This is where you indicate that January 2000, February 2000, and March
2000 actually make up Q1 2000 and that Q1 2000, Q2 2000, Q3 2000, Q4 2000 actually make up
the Year 2000. If you want to analyze a period of five years with the cubes, specify the five years
in the tree. The minimum element is monthly.

You also have the option of using dynamic range to determine your time period roll-ups at run
time. The time rollup periods are determined at run time based on the reporting plan. For
example, if the TC reporting plan was for an annual period, reporting for the dates beginning
01/01/2000 thru 12/31/2010 the rollup time periods would be calculated for annual periods from
2000 to 2010. Similarly for quarterly and monthly reporting plans, the rollup periods would be
set within the reporting date range of the plan. You do not need to create a TC_TIME tree for
each reporting period.

For more information about trees, see Tree Manager. For more information about defining
trees and queries for use with the PeopleTools Cube Manager, see Designing Cube
Metadata.

Populating Reporting Groups

You've already defined the groups you want to include in your reports and cubes. Now you have to populate the groups. This process populates two tables: TC_TIME and TC_POPULATION. In addition, this process generates an exchange file (exchange.csv). This file stores exchange rates between all the potential Employees' job currencies (for the employees who belong to any of the reporting groups defined in the plan) and the currency of the TC reporting plan. This file is loaded by Cognos in the Cube. This way, you can use the multi-currency function in Cognos Power Play and switch between currencies. Compensation and payroll amounts can be displayed in any of currencies loaded in the exchange file.

Group Population Process Page

Usage	Use this page to populate the reporting groups that you've defined.
Object Name	TC_GROUP_RUNCTL
Navigation	**Compensate Employees, Report Total Compensation, Process, Group Population Process, Group Population Process**
Prerequisites	You must have already created the reporting groups.
Access Requirements	Enter a run control ID.

Group Population Process page

Run Control ID   The **Run Control ID** that you entered appears here.

TC Plan ID (total   Select a **TC Plan ID** from the available options.
compensation plan ID)

Total Comp Plan Effdt
(total compensation plan
effective date)

Select the plan's effective date from the available options.

Run Type

Select the **Run Type**. A *Standard* run populates the
TC_POPULATION table with 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. A *Delete* run deletes
all the group records.

Click **Run** to run this request. Process Scheduler runs the Group Population process at user-
defined intervals.

For more information about Process Scheduler, see Process Scheduler.

Extracting Total Compensation Data

This chapter describes how to run the extract processes that populate your data warehouse and gives you a little background information on the processes. It is assumed that, at a minimum, you've already set up your Total Compensation reporting structure by following the steps in the Process Sequence.

If you are interested in modifying your PeopleSoft HRMS Total Compensation system to work with other third-party applications, and you need to develop modified trees, transaction pages, and Application Engine extracts, please see your Account Manager.

Overview of Data Extraction

Now that you've set up the Total Compensation reporting structure and have defined a reporting plan, you can fill the warehouse by extracting the data from PeopleSoft Benefits, PeopleSoft Human Resources, and PeopleSoft Payroll for North America. There are four possible sources for data extraction: Payroll, Multiple Components of Pay, Variable Compensation, and Benefits.

You must ensure before running any of the extraction processes that you have mapped 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 Roll-up Categories. In addition, make sure that the compensation tree is valid during the Total Compensation Reporting plan duration.

If you are managing Variable Compensation plans with groups in your PeopleSoft Administer Variable Compensation and you want to report on those awards in Total Compensation, you have to make sure that you are using the same Group IDs in the Variable Compensation and Total Compensation modules.

The processes separately store amounts extracted from the Multiple Components of Pay and Payroll Earnings modules to prevent double accounting.

The PeopleSoft Reporting Total Compensation module has simplified the task for data extraction, as you need to use just two pages to run all the extractions. The extract programs are listed in the following table:

Process Name	Compensation Source	Source Application
HR_TCBENEF	BENEFITS (K001)	Extracts Benefits and Deductions data from PeopleSoft Benefits.
HR_TCMCOMP	COMP	Extracts base pay data from PeopleSoft Human Resources.
HR_TCVCOMP	VCOMP	Extracts Earnings and Variable Compensation from PeopleSoft Human Resources.
HR_TCPYDED	PAYDEDUCT (K003)	Extracts Benefits and Deductions from PeopleSoft Payroll for North America. Selects DED_CUR from PAY_DEDUCTION for Empl/Ded Cd.
HR_TCPYERN	PAYEARNS (K004)	Extracts Earnings from PeopleSoft Payroll for North America.
HR_TCPYTAX	PAYTAX_CAN (K005)	Extracts Canadian taxes from PeopleSoft Payroll for North America.
HR_TCPYTAX	PAYTAX_US (K006)	Extracts US taxes from PeopleSoft Payroll for North America.

Some awards in the Variable Compensation module are based on the attainment of Target awards by certain dates. If those awards have not yet been calculated in the Variable Compensation module, then the Total Compensation module assumes all the goals have been attained (100% attainment). Thus, Target Awards populate the data warehouse for the corresponding period of time. The Reporting Total Compensation extraction process uses part of the Determine Allocation process logic from Variable Compensation module.

If you want to Calculate Target awards, check the "Calculate Target awards" check box on the Extraction Run Control page. If not, the system extracts approved and initially calculated awards from your Variable Compensation module and assumes no awards in Total Compensation for the periods of time for which no awards have been calculated in the Variable Compensation module.

ℹ️ For more information, see Managing Variable Compensation.

Ad-Hoc awards are extracted in Total Compensation. Note that the "Calculate Target Award" has no impact on Ad-Hoc plans.

ℹ️ For more information about setting up data from the Variable Compensation module, see Determining Allocations for Total Compensation Reporting.

Once the extraction processes have begun running, you can view the process status with the Plan Inquiry page.

Extraction Sequence

The extraction sequence involves first running a COBOL process and then running the Application Engine extracts. Data from PeopleSoft Benefits needs a bit more manipulation to fit into the warehouse, so you'll run two processes on Benefits data: a COBOL process and an extract. The following flow chart gives an overview of the extraction process:
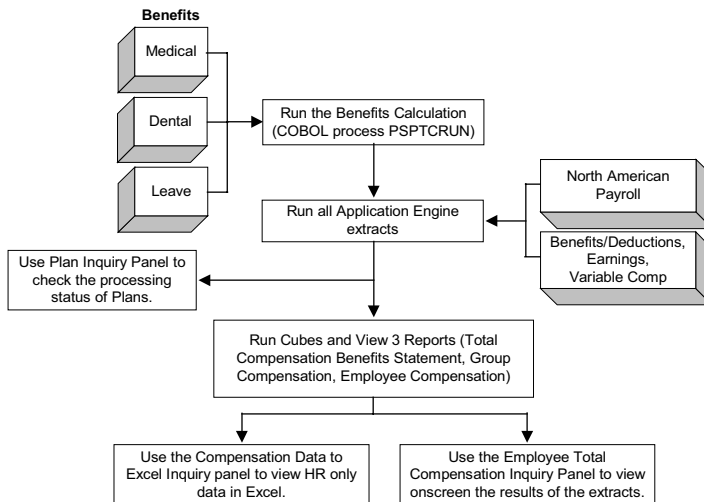
Extract Processes flowchart

Extracting Payroll Data

The extract process for North American Payroll data retrieves an employee's actual earnings, deductions and taxes along with employer paid taxes. Because all this data is stored in different tables within PeopleSoft, there are three Payroll extract programs:

- TCPYERN - Extracts Payroll actual earnings.

- TCPYDED - Extracts Payroll actual deductions withheld.

- TCPYTAX - Extracts Payroll actual taxes withheld.

Payroll data are *actuals*, meaning the process goes out and retrieves the actual, or real, amount. Payroll extracts produce a great deal of detail and the processing time can be quite significant. To reduce the run's size, you might consider limiting payroll extract runs to date intervals of one month or one quarter.

Extracting Compensation Data

Because compensation data resides throughout PeopleSoft HRMS, in some cases you need to run several extract processes to obtain a complete analysis. European customers can extract the

compensation data by running only the HR_TCMCOMP process for a complete extract. If you use the Benefits module, running the Benefits process is a prerequisite. This section describes the compensation processes

📝 If you're using cubes, the results from all compensation extractions can be summed together into one measure.

The Benefits Process

Extracting benefits data takes two steps: first, you must run the benefits calculation (the COBOL process PSPTCRUN), then you run the benefits extract (the Application Engine process HR_TCBENEF). You'll use the Ben Calc Run Cntl (Benefits Calculation Run Control) page to run the COBOL process that first collects benefits enrollment data effective as of the Thru Date defined in your reporting plan. It calculates the employee and employer share of the prices. If you're running PeopleSoft Benefits Administration, the process also calculates any applicable general, option, and/or waive credits.

The number of calculations the COBOL process performs is based on the Period Frequency specified on the Reporting Plan - Definition Page. For example, if your Plan ID specifies a two-year period, and your Period Frequency is set to Quarterly, then the Benefits data is calculated eight times.

📝 The benefit calculation results are accurate if you've selected the Monthly period frequency. If you've selected the Quarterly or Annually period frequency, the calculation is an approximation: it is calculated for the last month of the period and then multiplied by however many months are in the period. In other words, changes to an employee's enrollment during the period being calculated are not reflected in the calculation. The calculation reflects the employee's enrollment on the last day of the period.

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

The benefits calculation process calculates estimates for employees with multiple jobs. A benefits calculation is performed for each benefit record number using information from the benefits primary job. For example, if EmplID *8001* has three employment record numbers and two benefit record numbers, benefits calculations are performed for the following 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

Just like eligibility rules, calculation rules can specify a grouping method. The calculation rules, along with the Combine Salaries check box and the Include for Deductions flag, 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 flex credits are paid only when the primary job is part of the payroll calculation.

Benefit plans that are based upon the employee's actual earnings, such as savings, retirement, or pension, can be taken in of the following two ways:

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

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

View any error messages occurring during the benefits calculation with the Benefits Calculation Message page.

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 any records from TOTAL_DED having the same TC Plan ID. However, there is no utility provided to clean out this table for outdated information. You must manage this clean-up process.

Multiple Components of Pay Process

This process retrieves components of pay from the PS_COMPENSATION table.

The Multiple Components of Pay (MCOP) extract process performs a number of steps:

1. Retrieves the run control data.

2. Retrieves the Period Frequency data.

3. Verifies that the associated groups are populated.

4. Retrieves the MCOP data.

5. Populates the warehouse for each employee in the groups using the mapping between Compensation Rate Codes and comp IDs defined on the Compensation Mapping Page.

Variable Compensation Process

This process retrieves awards coming from any potential plans defined and managed in the Variable Compensation module.

The Variable Compensation extract process performs a number of steps:

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 module and writes them in the TC_EE_DETAIL table.

5. Calls the Determine Allocations process to calculate Target awards for future periods of time and updates the TC_EE_DETAIL table. This step is optional.

6. Populates the warehouse TC_EE_DETAIL table for each employee in the group using the mapping between Variable Compensation plan awards and Compensation IDs defined on the Compensation Mapping Page.

Benefits Calculation Page

Usage	Use this page to run the Benefits Calculation.
Object Name	RUN_CNTL_TOTL_COMP
Navigation	**Compensate Employees, Report Total Compensation, Process, Benefits Calculation, Ben Dedn Extract**
Prerequisites	Familiarity with the Process Scheduler.
Access Requirements	Enter a run control ID.

Benefits Calculation page

Report Request Parameters

Select the **Total Comp Plan ID** for the calculation from the available options. When you press TAB to move out of this field, the plan's description is displayed to the right.

Select an **Effective Date** from the available options. When you press TAB to move out of this field, the effective date that you selected is displayed to the right.

The **From Date, Thru Date,** and **TC Freq** (total compensation frequency) are displayed.

Restart Information

Enter the restart information by entering a **Chk** (check) **Point Interval in Minutes.**

Restart Position

The following fields are displayed: **Benefit Program, EmplID** (employee ID), **Empl Rcd Nbr** (employee record number), and **Thru Date** (through date).

Click **Run** to run this request. Process Scheduler runs the Benefits Calculation process at user-defined intervals. This COBOL process writes to the PS_TOTAL_DED table.

For more information about the Process Scheduler, see Process Scheduler.

Benefits Calculation Message Page

Usage	This page displays information about any errors occurring in the benefits calculation. The calculation processes transactions at the employee level, so errors generated include employee ID and employee record number.
Object Name	CALC_MESSAGE
Navigation	**Compensate Employees, Report Total Compensation, Inquire, Benefits Calculation Message, Calculation Process Messages**
Prerequisites	Running the Benefits Calculation Process.
Access Requirements	Enter a TC Plan ID.
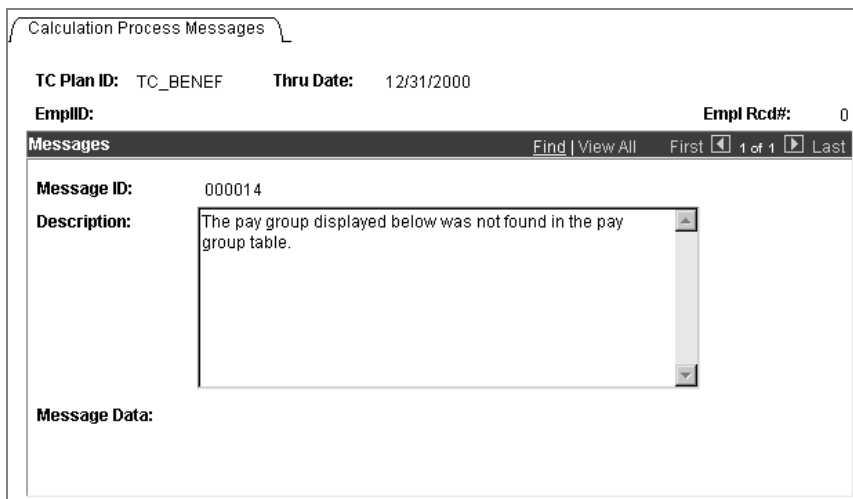
Benefits Calculation Message page

Total Comp Plan ID	The **Total Comp Plan ID** for the Benefits Calculation process that you've run is displayed.
Thru Date	The **Thru Date** for this process is displayed.
EmplID	The **EmplID** is displayed. This represents the error.
Empl Rcd # (employee record number)	The **Empl Rcd #** is displayed. This represents the error.
Message ID	This is the ID number for the message.
Description	The description for the **Message ID.**
Message Data	Additional data regarding the message.

Extract Page

Usage	Use the Extract Process page to run the extracts and view the run history.
Object Name	TC_RUN_CNTL_PNL
Navigation	**Compensate Employees, Report Total Compensation, Process, Extract, Extract**
Access Requirements	Enter a run control ID.

Extract page

Run Control ID	The **Run Control ID** that you entered is displayed.
TC Plan ID	Select a **Plan ID** from the available options.
Effective Date	Enter an **Effective Date.**
From Date	Enter a **From Date.**
Thru Date	Enter a **Thru Date.**
Run Type	Select the **Run Type.**
	Select *Standard* for a normal, first time run. Once you begin the run, the report plan status is frozen, and you cannot modify the interval dates or plan groups.
	Recalculations are not allowed. The only way to change the reporting plan status back to unfrozen is to run the extracts in *Delete* mode.
	Select *Delete* when you want to rerun a process. Selecting *Delete* purges the data in the TC_EE_Detail table. Once the reporting plan status is unfrozen, the plan dates and groups are available for modification. You must then select *Standard* to retrieve the information.
Calculate Target Award	Select this check box when you want to include data from the Determine Allocation process from the Variable Compensation module.
	If you clear this check box, the TCVARCMP process extracts data from just the VC_AWARD table. For example, Q1 and Q2 would have data from VC_AWARD, but Q3 and Q4 would not have any data. If the check box is selected, you would have the targeted awards for Q3 and Q4. (Target Awards are the awards corresponding to 100% attainment of the goals.)

Prior Plan Runs	The history of this plan's previous runs is displayed. Information given includes **Program, Run Date and Time, From Date, Thru Date,** and **Program Status.**

Click **Run** to run this request. Process Scheduler runs the extract processes at user-defined intervals. These Application Engine processes write data to the TC_EE_DETAIL table.

For more information about the Process Scheduler, see Process Scheduler.

Plan Inquiry Page

Usage	Use this page to view the status of the extracts for a given reporting plan.
Object Name	TC_PLAN_INQ_PNL
Navigation	**Compensate Employees, Report Total Compensation, Inquire, Plan Inquiry, Plan Inquiry**
Access Requirements	Enter a TC plan ID and an effective date.

Plan Inquiry page

This page displays all the parameters of the plan and parameters from previous executions of the process.

TC Plan ID	The **Plan ID** that you entered is displayed.
Effective Date	The **Effective Date** that you entered is displayed.
Period Frequency	The **Period Frequency** of the report is displayed.

From Date	The **From Date** of the report is displayed.
Thru Date	The **Thru Date** of the report is displayed.
Plan Frozen	The **Plan** status is displayed.
Cur Effdt (current effective date)	The type of **Current Effective Date** is displayed.
Currency Code	The report's **Currency Code** is displayed.
Rate Type	The report's **Rate Type** is displayed.
Current Rate Effdt (current rate effective date)	The **Current Rate Effdt** is displayed.
Plan History Status	This area displays the status of previous plan runs. Information given includes **Program, From Date, Thru Date, Run Type, Run Date and Time, User,** and **Status.** Valid values for Status are ***Running, Completed,*** and ***Failed.***

C H A P T E R 8

Including Ad Hoc Information in the Data Warehouse

All of the compensation information that has been discussed so far (for example, Variable Compensation, Benefits, and Base Compensation), is already tracked within PeopleSoft HRMS for other purposes. The information from these modules populates the warehouse when you run the extract processes.

You can add any ad hoc information directly into the warehouse. Typically, ad hoc awards represent organizational costs that aren't tracked within the HRMS system. Ad hoc employee awards may include special cash performance awards, team awards, or paid parking for executives, while ad hoc organization awards might include company provided food items, such as coffee and pastries, or holiday gifts, such as turkeys. We recommend that you use the Ad Hoc Employee page when there are just a few individuals receiving ad hoc compensation. Process larger numbers of entries using the Ad Hoc Organization page.

When you enter information in the Ad Hoc pages and then save them, the information is written immediately into the data warehouse. Ad hoc data never needs to be extracted; once you enter it, it is immediately available for reports or inquiries.

To Add an Ad Hoc Award:

1. Set up a compensation source using the Compensation Source Page. On the Comp Source page, the Source Type must be *Ad Hoc Emp* or *Ad Hoc Org*. The Extract program must be left blank and the Map Based On field must be set to *No Mapping*.

2. Set up a comp ID (compensation ID) for the award. Use the Compensation Definition Page.

3. Insert the new comp ID into the Total Compensation tree. Use PeopleSoft Tree Manager.

For more information about setting up the Total Compensation tree, see Setting Up the Compensation Tree.

4. Use either the Ad Hoc Employee Page or Ad Hoc Organization Process Page. Once you save the page, the information is added into the data warehouse.

5. Continue with processing OLAP cubes or running reports.

Ad Hoc Employee Page

Usage	Use this page to add ad hoc compensation for a small number of employees.
Object Name	TC_ADHOC_EMPL
Navigation	**Compensate Employees, Report Total Compensation, Use, Ad-Hoc Employee, Ad-Hoc Employee**
Access Requirements	Enter a TC plan ID, effective date, compensation ID, and compensation source.

Ad Hoc Employee page

TC Plan ID (total compensation plan ID)	The **TC Plan ID** that you entered is displayed.
Effective Date	The **Effective Date** that you entered is displayed.
Compensation ID	The **Compensation ID** that you entered is displayed.
Compensation Source	The **Compensation Source** that you entered is displayed.
EmplID (employee ID)	Enter the **Employee ID** of the person who you are awarding.
Job As Of Date	Select the Employee's job as of the date you're offering the award. Defaults to the *Thru* date. You can change if desired.
Employee Information	This area displays the **Empl Rcd#** (employee's record number) and **SeqNum** (sequence number).

Job Information	This area displays information about the employee's job: **Jobcode SetID, Job Code, Position, Salary SetID, Sal Plan, Grade,** and **Step.**
Company Information	This area displays information about the employee's company: **Business Unit, Company, Location SetID, Location, Dept. SetID,** and **Department.**
Date Interval	Enter the **Date Interval** for this award. You can use the plan's dates (default values), or you can select the **Date Override** check box, and enter a **From Date** and **Thru Date**. The dates that you enter must fall within the plan's From and Thru Dates.
Payroll Amount/Conv Comp Amt	Enter the **Payroll Amount** or the **Compensation Amount** of the award for this employee. When you select this check box, the ad-hoc award is reported in the Compensation measure or in the Payroll measure in OLAP.

Ad Hoc Organization Process Page

Usage	Use this page to add ad hoc compensation for a group of employees.
Object Name	TC_ADHOC_ORG
Navigation	**Compensate Employees, Report Total Compensation, Process, Ad-Hoc Organization, Adhoc Organization**
Access Requirements	Enter the run control ID.

Ad Hoc Organization process page

Plan Information

Enter information in this area about the Plan: **TC Plan ID, Effective Date, From Date, Comp Source, Compensation ID,** and **Thru Date.**

Date Interval

Enter information in this area about the **Date Interval** for the award: **From Date** and **Thru Date.**

Organization

Enter information about the employee's Organization: **Job As Of Date** of the award, and **Group ID.** The ad-hoc awards are distributed to all the employees in the group specified in **Group ID** as of the date entered in the **Job As Of Date.**

Amount

Enter the **Amount** of the award. This is the total amount awarded to every person in the group.

Processing the OLAP Cubes

Now that you've completed the setup for the cubes, you just have to process them. Once you've processed the cubes, use Cognos PowerPlay or another OLAP tool to analyze the cubes.

To process the cubes:

1. Set the destination directory.

2. Build the cube. Use the Cube Page.

3. Analyze the results with an OLAP tool.

You must process the Compensation Cube and the Headcount/FTE cube from within the PeopleSoft Reporting Total Compensation module. You can view the cubes with Cube Manager, but you must return to the PeopleSoft Reporting Total Compensation module when you're ready to process them.

Setting the Destination Directory

PeopleSoft HRMS places the cube processing output (*.MDL, *.MDC, *.ASC and *.LOG) in the default directory C:\temp. Change the destination directory at **Cube Manager, Build, Cube Instances** and click the Platform Options button.

Cube Page

Usage	Use this page to build the cubes.
Object Name	TC_RUNCNTL_CUBE
Navigation	**Compensate Employees, Report Total Compensation, Process, Cube, Cube**
Prerequisites	Running the extracts
Access Requirements	Enter a run control ID.

Cube page

Cube Instance ID	Select the cube that you want to process.
Total Comp Plan ID	Select a **Total Comp Plan ID.**
As of Date	Enter the **As Of Date**, which is the Plan's effective date.
Time Rollup Attribute	Select either *Average, Last Period,* or *First Period.* These XLAT values indicate how values are rolled up along the time dimension. For example, if you would like the FTE values of four quarters to be averaged in a time rollup for the entire year, choose *Average*. If you would like the last quarter value to be rolled up to represent the year then choose *Last Period*.
Drill Through Cube	Enter the path for the Cognos .mdc file generated by the process. Cognos uses this file to read all dimensions and measures. A default path appears based on your PeopleTools installation. The Drill Through Cube defaults to headcount if you are building the compensation cube. The Drill Through Cube defaults to compensation if you are building the headcount cube.
	The path and filenames are defaulted to the default log/output directory being used when you chose which cube to create. You can change the directory/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 could not drill through to it. Likewise, if you were creating the headcount cube the drill through cube should be the compensation cube.

Post-Build Script	Enter the path for the Cognos .mdl file generated by the process. Cognos uses this file for currency conversion. A default path appears based on your PeopleTools installation. The path and filename are defaulted to the default log\output directory for this when the cube is chosen (headcount or compensation cube). For the compensation cube, the filename must be TC_COMP_P.MDL and for the headcount cube, the filename must be TC_HD_P.MDL. This is a required field.

Click **Run** to run this request. Process Scheduler runs the Cube Build process at user-defined intervals.

[i] For more information about the Process Scheduler, see Process Scheduler.

Viewing and Analyzing the Cube Data With PowerPlay

View and analyze the Compensation and Headcount/FTE cubes with Cognos PowerPlay. PowerPlay enables you to perform online analytical processing of Total Compensation data by "slicing and dicing" the data from different views or dimensions. You can pivot, reposition, and manipulate your data, as well as create graphs and charts.

[i] For more information about using Cognos PowerPlay, see your PowerPlay documentation.

C H A P T E R   1 0

Using Total Compensation Inquiries and Reports

This chapter discusses how to run the three available reports for Total Compensation: the Benefits Statement, the Employee Compensation report, and the Group Compensation report. In order to run the reports, you must have completed the steps in the Process Sequence.

There are three reports available:

- Employee Benefits Statement. This report offers a full listing of all compensation for each individual. This report is intended for distribution to employees: when printed, each individual's statement appears on a separate sheet.

- Employee Compensation Report. This report provides detailed information about each type of compensation for each individual within the groups that you specify.

- Group Compensation Report. This report contains one line of data for each individual compensation ID for the groups that you specify.

In addition to the three reports, the PeopleSoft Reporting Total Compensation module offers an inquiry page for you to view on-screen the results of the Employee Compensation report before printing. You can also access a page that enables you to launch Excel with the data from PeopleSoft Human Resources, so that you can view the data in a spreadsheet format.

The following sections discuss how to run each report.

For more information about reporting in general, see Introduction to PeopleSoft Reporting. For more information and a list of all PeopleSoft Human Resources reports, see List of Reports in PeopleSoft Human Resources.

List of Total Compensation Reports

Report Name	Report ID	Location	Global or Local
Total Compensation Statement	TC001	Compensate Employees, Report Total Compensation, Report	GBL
Group Summary Compensation	TC002	Compensate Employees, Report Total Compensation, Report	GBL

Report Name	Report ID	Location	Global or Local
Employee Compensation Report	TC003	Compensate Employees, Report Total Compensation, Report	GBL

Generating the Total Compensation Statement Report

Run the Total Compensation Statement report to retrieve a report that details an employee's total compensation package. Because this report can be distributed to employees, it prints each employee's information on a separate sheet of paper.

Employee Total Compensation – Benefits Statement Page

Usage	Use this page to obtain a Benefits Statement for employees. The report, which is meant for distribution to employees, prints each employee's information on a separate page.
Object Name	TC_BEN_RUN_CNTL
Navigation	**Compensate Employees, Report Total Compensation, Report, Employee Total Compensation, Benefit Statement**
Prerequisites	Run all the extracts discussed in Extracting Total Compensation Data.
Access Requirements	Enter a run control ID.

Employee Total Compensation – Benefits Statement page

User ID   Your **User ID** is displayed.

Run Control ID   The **Run Control ID** that you entered is displayed.

TC Plan ID (total compensation plan ID)	Select a **Plan ID** from the available options.
Total Comp Plan Effdt (total compensation plan effective date)	Select a **Total Comp Plan Effdt** from the available options.
From Date	Enter a **From Date.** You can select a period of time that is a subset of the specified period for this **Plan ID.**
Thru Date	Enter a **Thru Date.** You can select a period of time that is a subset of the specified period for this **Plan ID.**
Amount Type	Select an **Amount Type:** *Compensation Amount, Payroll Amount, (None).*
Sort By	You can have the report sorted *By Department, By Location,* or *By Last Name.*
Group ID	You can run this report on a subset of the groups specified for this **Plan ID.** Select the groups within the specified **Plan ID** for which you want to run this report.
Description	When you press TAB to move to this field, the **Group ID Description** is displayed.

Click **Run** to run this request. Process Scheduler runs the report at user-defined intervals.

For more information about the Process Scheduler, see Process Scheduler.

Total Compensation Statement Report

Description	This report captures the Total Compensation information for each employee as of a specified date. It includes either base pay or variable pay and data extracted from PeopleSoft HR and Benefits or data extracted from PeopleSoft Payroll (North American).
Report ID	TC001
Type of Report	SQR
Parameters	Total Compensation reporting plan, range of dates (From and Thru dates), Amount Type, Group ID
Source	TC_BEN_RUN_CNTL
Source Records	TC_EE_DETAIL, TC_COMP_DEFN, PERSONAL_DATA, TC_COMP_SOURCE

Sorted By	You have the option to sort by department, location, or last name.

Generating the Group Summary Compensation Report

The Group Compensation report sums up all total compensation information for employees in groups. Each comp ID that you've defined reports a value. For example, in your reporting plan, you've specified a group of five employees, and you've defined three comp IDs. The Group Compensation report gives three values, one for each comp ID. The values are summed for the group.

Group Summary Compensation Page

Usage	Use this page to run a report that sums all compensations for employees in groups.
Object Name	TC_GRP_RUN_CNTL
Navigation	• **Compensate Employees, Report Total Compensation, Report, Group Detail Compensation, Employee Compensation Report** • **Compensate Employees, Report Total Compensation, Report, Group Summary Compensation, Group Compensation**
Prerequisites	Run all the extracts discussed in Extracting Total Compensation Data.
Access Requirements	Enter a run control ID.

Group Compensation page

TC Plan ID   Select a **Plan ID** from the available options.

Total Comp Plan Effdt   Select a **Total Comp Plan Effdt** from the available options.

From Date	Enter a **From Date.** You can select a period of time that is a subset of the specified period for this **Plan ID.**
Thru Date	Enter a **Thru Date.** You can select a period of time that is a subset of the specified period for this **Plan ID.**
Amount Type	Select an **Amount Type:** *Compensation Amount, Payroll Amount,* and *(None).* These values refer to the data sources.
Group ID	You can run this report on a subset of the groups specified for this **Plan ID.** Select the groups within the specified **Plan ID** for which you want to run this report.
Description	When you press TAB to move to this field, the **Group ID Description** is displayed.

Click **Run** to run this request. Process Scheduler runs the report at user-defined intervals.

For more information about the Process Scheduler, see Process Scheduler.

Group Summary Compensation Report

Description	This report gives the sum of all compensation for groups.
Report ID	TC002
Type of Report	SQR
Parameters	Plan ID, TC Plan Effdt, From Date, Thru Date, Amount Type, Group ID
Source	TC_GRP_RUN_CNTL
Source Records	TC_EE_DETAIL
Sorted By	Group or Compensation ID

Generating the Employee Compensation Report

The Employee Compensation report provides a listing of all compensation IDs for employees in a group. Each comp ID that you've specified returns a value. For example, if you have a group of 15 employees, and have specified four comp IDs, the report returns four values for each of the 15 employees.

📝 If you have entered ad-hoc awards directly in the TC warehouse, they will be reported on a separate page for each employee.

If you would like to check the results of the report before actually printing it, you can use the Employee Total Compensation Inquiry page. The Inquiry page writes the output to the screen.

Group Detail Compensation – Employee Compensation Report Page

Usage	Use this page to run a report that lists all compensation for employees within a group.
Object Name	TC_GRP_RUN_CNTL
Navigation	• **Compensate Employees, Report Total Compensation, Report, Group Detail Compensation, Employee Compensation Report** • **Compensate Employees, Report Total Compensation, Report, Group Summary Compensation, Group Compensation**
Prerequisites	Run all the extracts discussed in Extracting Total Compensation Data.
Access Requirements	Enter a run control ID.

Group Detail Compensation – Employee Compensation Report page

TC Plan ID	Select a **Plan ID** from the available options.
Total Comp Plan Effdt	Select a **Total Comp Plan Effdt** from the available options.
From Date	Enter a **From Date.** You can select a period of time that is a subset of the specified period for this **Plan ID.**
Thru Date	Enter a **Thru Date.** You can select a period of time that is a subset of the specified period for this **Plan ID.**

Amount Type	Select an **Amount Type:** *Compensation Amount, Payroll Amount,* and *(None).* These values refer to the data sources.
Group ID	You can run this report on a subset of the groups specified for this **Plan ID.** Select the groups within the specified **Plan ID** for which you want to run this report.
Description	When you press TAB to move to this field, the **Group ID Description** is displayed.

Click **Run** to run this request. Process Scheduler runs the report at user-defined intervals.

For more information about the Process Scheduler, see Process Scheduler.

Employee Compensation Report

Description	Use this report to see all compensation for employees within a group.
Report ID	TC003
Type of Report	SQR
Parameters	Plan ID, Effective Date, From Date, Thru Date, Amount Type, Group ID
Source	TC_GRP_RUN_CNTL
Source Records	TC_EE_DETAIL
Sorted By	Group / Employee / Compensation ID

Employee Total Compensation Page

Usage	Use this page to see on-screen the compensation for all employees within the specified groups. This inquiry page gives the same results as the Employee Total Compensation report, except the output is to the screen.
Object Name	TC_EE_COMP
Navigation	**Compensate Employees, Report Total Compensation, Inquire, Employee Total Compensation, Employee Total Compensation**
Prerequisites	Run all the extracts discussed in Extracting Total Compensation Data.
Access Requirements	Enter an employee ID.

```
┌──────────────────────────────────────────────────────────────────────┐
│ ╱ Employee Total Compensation ╲                                        │
│                                                                        │
│  EmplID:   KU0009      Turbic,Stephanie              Empl Rcd#:    0    │
│                                                                        │
│  TC Plan ID:  [K004    ] [Q]    TC Plan Effdt:   [07/24/2000] [Q]       │
│                                                                        │
│  From:        [01/01/1999] [📅]  Thru Date:      [12/31/1999] [📅]       │
│                                                                        │
│  Amount       [Compensation Amount      ▼]              Refresh         │
│  Type:                                                                  │
│ ┌────────────────────────────────────────────────────────────────────┐│
│ │ Compensation Detail            View All   First ◀ 1 of 1 ▶ Last     ││
│ │ Group ID   Compensation ID  From Date  Thru Date  Comp Amt  Currency Code ││
│ │                                                     0.000           ││
│ └────────────────────────────────────────────────────────────────────┘│
└──────────────────────────────────────────────────────────────────────┘
```

Employee Total Compensation page

EmplID (employee identification)	The employee ID that you entered is displayed.
Empl Rcd# (employee record number)	The **Employee Record** that you entered is displayed.
TC Plan ID	Select the **TC Plan ID** from the available options.
TC Plan Effdt	Select the **TC Plan Effective Date** from the available options.
From	Enter the **From** date for this inquiry. You can inquire on a subset of the plan's period.
Thru Date	Enter the **Thru Date** for this inquiry.
Amount Type	Select the **Amount Type** for this inquiry: *Compensation Amount, Payroll Amount,* and *(None).* These values refer to the data sources.

Compensation

This group box contains the employee's information, including **Group ID, Compensation ID, From Date, Thru Date, Comp Amt** (amount), and **Currency Code.**

Click the **Refresh** link when you've entered or modified one of the parameters to load the associated data onto the page.

Viewing Compensation Data in Excel

The PeopleSoft Reporting Total Compensation module has a feature that enables you to view any information obtained from PeopleSoft Human Resources in Excel. The information extracted from PeopleSoft Human Resources is one part of the total information needed for the other Total Compensation reports, but it's the only source used for this feature. You can't get Benefits or Payroll information with this feature.

Compensation Data to Excel Page

Usage	Use this page to launch Excel with information you've extracted from PeopleSoft Human Resources.
Object Name	TC_EXCEL_RUNCTL
Navigation	**Compensate Employees, Report Total Compensation, Inquire, Compensation Data to Excel, Compensation Data to Excel**
Prerequisites	Run all the extracts discussed in Extracting Total Compensation Data.
Access Requirements	Select the page name. Nothing is required to enter the page.

Compensation Data to Excel page

From Date   Enter a **From Date.**

Thru Date   Enter a **Thru Date.**

Currency Code   Select a **Currency Code.**

Rate Type   Select a **Rate Type.**

Cur Effdt (current effective   Select a **Current Effective Date.**
date)

Population

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

Employee(s)

If you select **Employee(s)** in the **Population** group box, you can select one or more **EmplID** that you want in the results. The employee's **Name** is displayed after you select and ID.

Group(s)

If you select **Group(s)** in the **Population** group box, you can select one or more **Group ID** that you want in the results. The group's **Description** is displayed after you select and ID.

Click the **Launch Excel** link to launch Excel and have the data entered into a spreadsheet.

Technical Notes

When the Excel file is created, it is created and saved in the Default Log/Output directory on the server. In order to be able to view this on the client machine, the file needs to be FTP'd to the client. An FTP server needs to be set up that allows read/write access to the default log output directory being used.

A URL identifier needs to be created to give the client access to the file on the FTP server.

Index