PeopleSoft 8.3 Human Resources PeopleBook: Report Total Compensation

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About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in these books, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate the PeopleSoft system, much of the information in these books is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook.*

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: http://www4.peoplesoft.com/cc

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.3 HRMS PeopleBooks,* SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks,* SKU PTB814R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft Internet site: http://www.peoplesoft.com.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**
Email	Email CPI at **callcenter@conpub.com**.

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields and provides standard definitions.

Field	***Definition***
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	*Definition*
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also **Fax Number)**	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.

Field	*Definition*
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are ***Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2,*** or ***Telex.***
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the **Process Frequency** group box: **Once** executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to **Don't Run**. **Always** executes the request every time the batch process runs. **Don't Run** ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Field	*Definition*
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also **Province)**	State (Province) for address.
Status	Indicates whether a row in a table is ***Active*** or ***Inactive.***
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, "Creating Field Definitions," Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field Click to refresh the Name field after you've edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

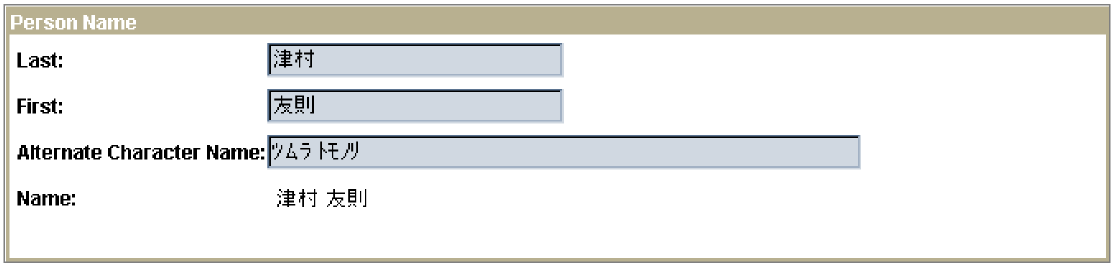
The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title	Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and **Name Prefix**	Select a Prefix or Name Prefix, if applicable.
Royal Prefix	Select a Royal Prefix, if applicable.
First Name	Enter the employee’s official first name.
Preferred First Name	For The Netherlands, enter the employee’s preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.
Middle	Enter the employee’s middle name, if applicable.
Last Name	Enter the employee’s official last name.
Suffix	Select a suffix, if applicable.
Second Last Name	For Spanish employees, enter the second surname (mother’s surname).
Alternate Character Name	Use this field to enter the employee’s name using alternate characters (such as Japanese phonetic characters). **Note.** You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter. **Warning!** Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.
Royal Suffix	Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Name	The system displays the employee’s name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays "Last Name[space]First Name," not "Last Name,First Name"; that is, a space separates the last and first names, not a comma.



Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, "Setting Up PeopleSoft HRMS," Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

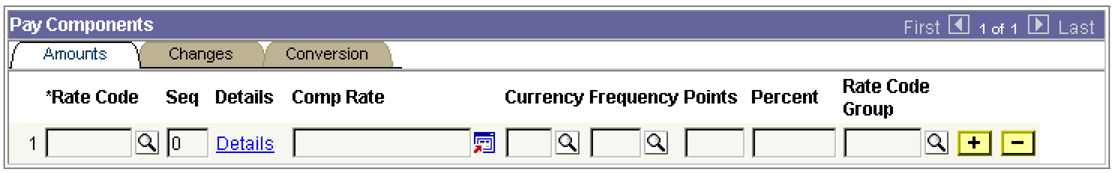
Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, **Address 2**, **Address 3**, and **Address 4**	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and **Number 2**	Enter the number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.

House Type — Enter the house type, if applicable.

Postal Search — Click **Postal Search** to use international address formats.

Entering or Viewing Pay Components

Amounts Tab



Pay Components - Amounts

Rate Code — Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid.

Note. If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.

Seq (sequence) — The sequence number of the rate code if it is used more than once.

Details — Click the **Details** button to open the Comp Rate Code Secondary Panel page.

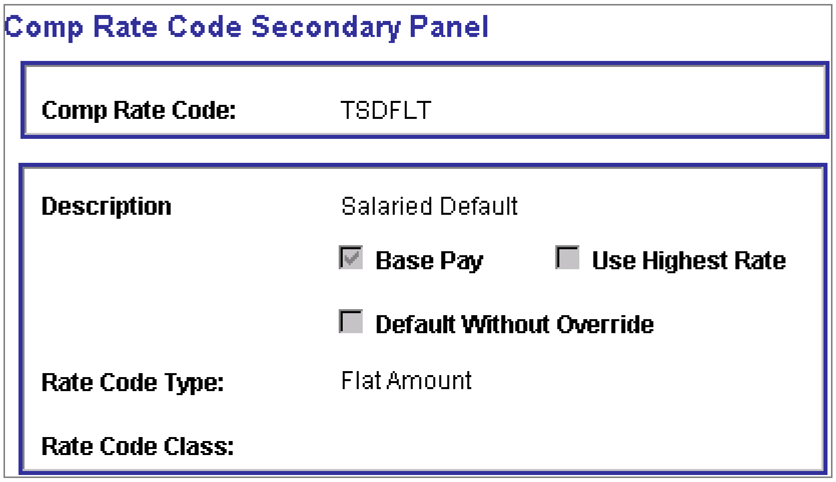
Comp Rate, (compensation rate) **Currency**, and **Frequency** — The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.

Apply FTE — If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for ***Percent*** rate codes.

Points — The salary points associated with this rate code, if any.

Percent — If the rate code rate type is ***Percent,*** the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.

Rate Code Group — A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.



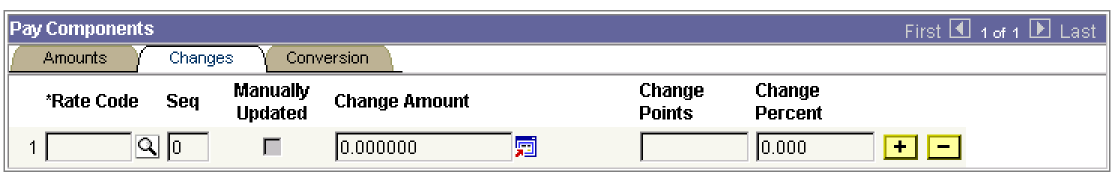
Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," **Defining Rate Codes**

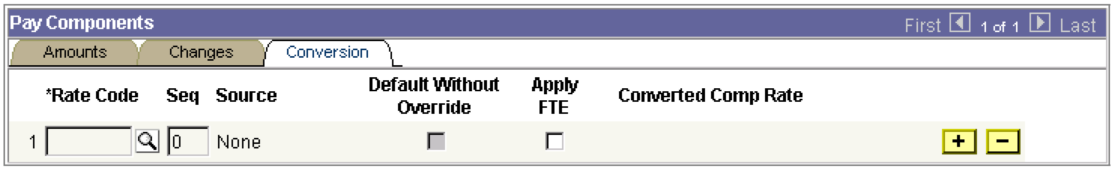
Changes Tab



Pay Components – Changes page

This page displays the change in an employee's salary.

Manually Updated	The system selects this if you have manually updated the pay components.
Change Amount	The overall change amount to this pay component rate.
Change Points	The overall change amount (in points) to this pay component, if applicable.
Change Percent	The overall percentage change to this pay component, if applicable.



Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source	The system displays the source of the rate code, such as ***Absorbing Premium***, ***Seniority Pay***, ***Job Code***, or ***Manual***.
Default Without Override	Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.
Apply FTE	Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.
Converted Comp Rate	Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.

Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
See Also	PeopleBooks provide cross-references under the heading "See Also." Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example: ***See Also*** *About These HRMS PeopleBooks,* **PeopleSoft 8.3 HRMS PeopleBooks Preface**

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

Page	System Name	Navigation	Usage
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a note or within text, if appropriate.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

About the PeopleSoft 8.3 Human Resources PeopleBook: Report Total Compensation

This book provides you with the information you will need for implementing and using PeopleSoft Human Resources: Report Total Compensation.

This chapter complements and extends the About the HRMS PeopleBooks section of HRMS documentation by providing specific information on how to use the documentation for Human Resources. Much of the general information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft Application Fundamentals section lists where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks"

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions for Human Resources.

Field	*Definition*
Benefit Plan	A specific benefit offering within a plan type.
Benefit Plan Type	Also known as Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.
Benefit Program	A collection of benefit plans your company offers to a group of employees.

Field	*Definition*
Deduction	Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.
Deduction Code	The code assigned to a benefit deduction.
FSA Maximum Annual Pledge	This is the total maximum an employee can pledge to contribution to a health or dependent care flexible spending accounts during a benefit plan year.
FSA Minimum Check Amount	This is the minimum amount for which a check will be printed.
Plan Type	Also known as Benefit Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Understanding the Documentation

Documentation for PeopleSoft Human Resources is made up of 25 business processes, each with their own book:

- Administer Company Cars
- Administer Festive Advance
- Administer Salaries for the Netherlands
- Administer Salary Packaging
- Administer Training
- Administer Variable Compensation
- Administer Workforce
- Base Benefits
- Manage Commitment Accounting
- Manage Competencies
- Manage French Public Sector
- Manage Netherlands Salary Administration
- Manage Performance
- Manage Positions

- Manage Professional Compliance
- Meet Regulatory Requirements
- Monitor Absence
- Monitor Health & Safety
- Plan Careers and Successions
- Plan Salaries
- Recruit Workforce
- Report Total Compensation
- Track Faculty Events
- Track Flexible Service
- Track Global Assignments

Human Resources Reports

The documentation for the Human Resources reports is in the reports chapter in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*. There you will find information about each report, listed by module.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports"

CHAPTER 2

Overview of Total Compensation Reporting

This chapter provides an overview of the Report Total Compensation business process.

Understanding Total Compensation Reporting

To effectively manage the collective cost of compensating your employees, you must be able to track, report, and analyze those costs. The Report Total Compensation business process in PeopleSoft Human Resources offers a variety of ways to view and analyze information gathered from throughout PeopleSoft HRMS:

- Payroll for North America.
- Base Benefits and Benefits Administration.
- Human Resources—multiple components of pay (MCOP) and variable compensation (VC).

You can also report on data that isn't in another PeopleSoft application through the ad hoc pages.

Output of Total Compensation Reporting

Reports

- Employee Benefits statement: A listing of all compensation for each individual, designed for distribution to employees.
- Employee Compensation report: Detailed information about each compensation type for each individual within a group that you specify.
- Group Compensation report: Aggregated information for each individual within a group that you specify.

Inquiries

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

Spreadsheet

Retrieve Human Resources compensation data and display it in Microsoft Excel.

OLAP Analysis Models (Cubes)

PeopleSoft HRMS integrates with Cognos PowerPlay, an OLAP tool, so that you can analyze these cubes.

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

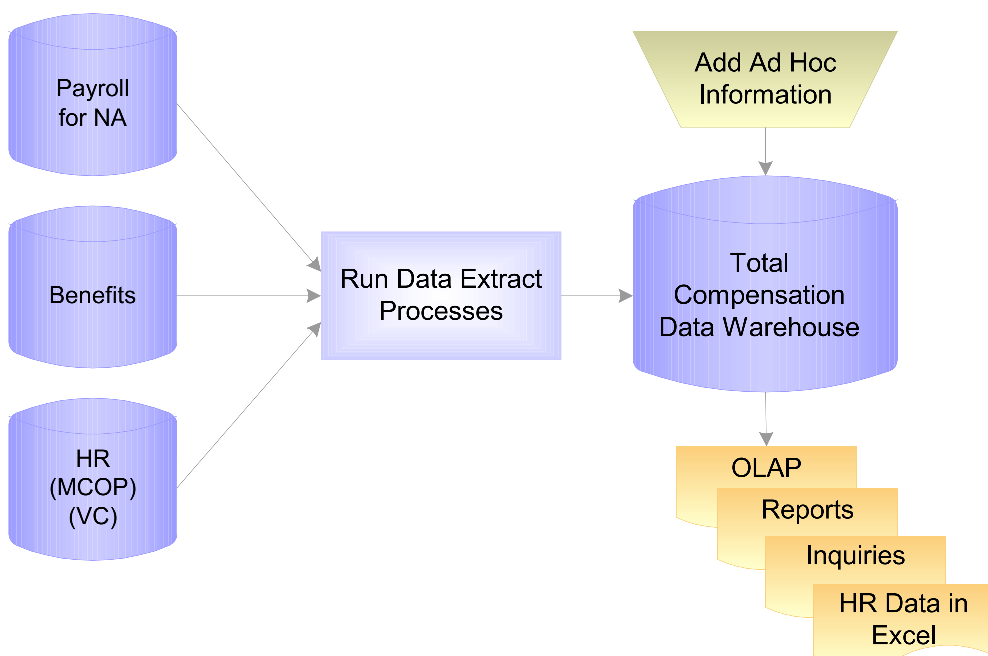
This document assumes you are familiar with OLAP concepts and terminology.

See Also

PeopleTools PeopleBook: Cube Manager

Understanding the Reporting Process

This illustration shows an overview of the Report Total Compensation process:

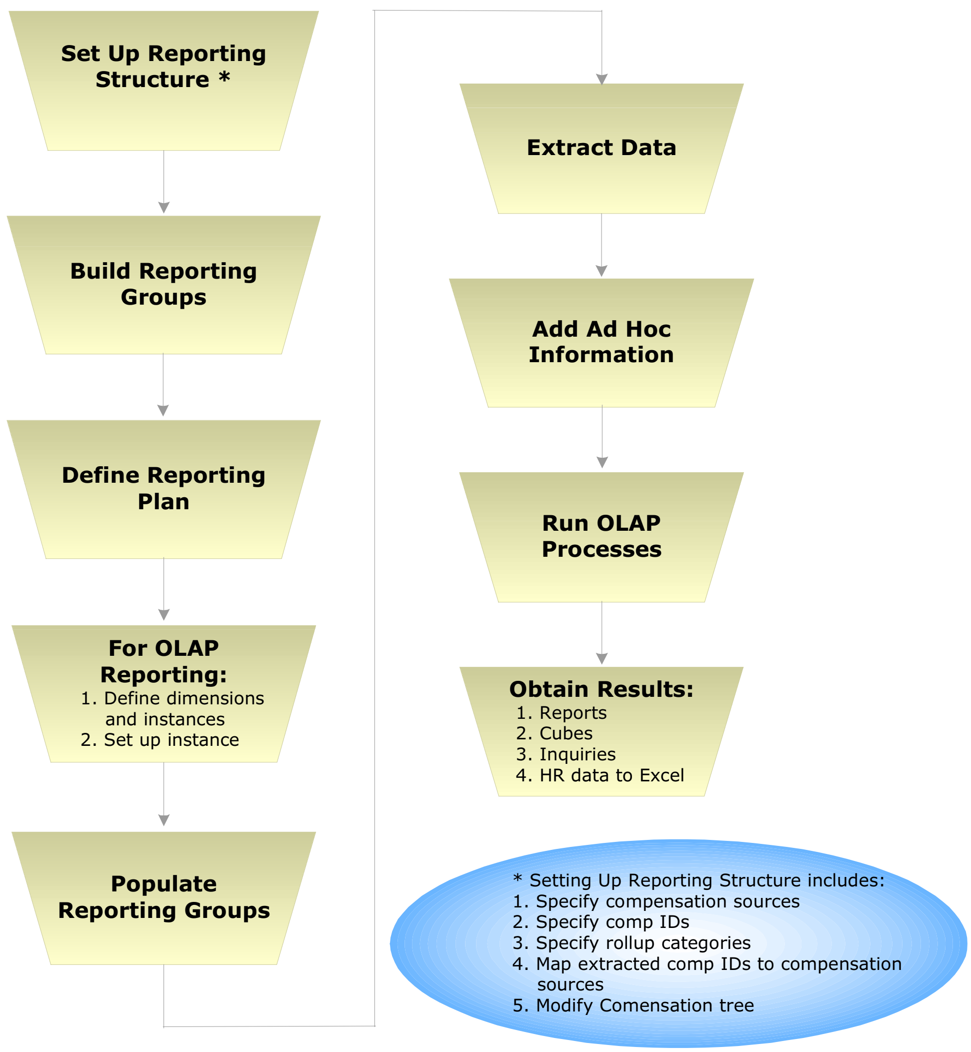


The Report Total Compensation process

Process Sequence

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

This flow chart illustrates how the steps work together to define results. Set up a reporting structure once and change it occasionally. Perform the other steps as needed.



Process sequence

Compensation Tree

The data warehouse stores the data that it collects based on the structure of the Compensation Tree. PeopleSoft provides a Compensation Tree that you alter as needed. Change the tree structure before data collection begins.

For the Report Total Compensation business process, you can define the leaves and nodes of the tree *before* you define the tree. The trees in the business process use a dedicated tree structure. The tree nodes are called *rollup categories*, and the tree leaves are called *compensation IDs*, or comp IDs; both of these are defined when building the tree.

```
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
```

Report Total Compensation tree structure

Note. 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 comp IDs are the elementary pieces of the reporting business process. Each comp ID represents a figure reported in the results. Comp IDs are the leaves on the Compensation Tree. Having comp IDs enables the Report Total Compensation business process to gather data the same way, for any type of result.

PeopleSoft HRMS supplies predefined comp IDs; you add comp IDs mostly 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 map that comp ID to each source so that the business process gathers all the resulting data that you want. This scenario is highly unlikely as the results would include just one figure.

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

Time Periods

Define a time period for information using standard From and Thru Date fields. Specify a period frequency, which represents how many times within the period you want the business process 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 business process extracts data four times for 1997: 03/01/1997, 06/01/1997, 09/01/1997 and 12/01/1997. If you specify 01/01/1997 and 12/31/1998 as your From and Thru Dates, the business process 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.

Note. Report data is more accurate when you set up the business process 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). Because processing such accurate reports requires time, you should explore the processing capacity of your hardware.

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

You can have one reporting plan with several different From and Thru Dates. However, when you run the extraction process, you can 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 running the extraction process, you can specify that plan number seven run for just one year.

Preventing Double Accounting

Safeguards in PeopleSoft HRMS greatly reduce the possibility of double accounting. Theoretically, there are two instances that the reporting business process can count compensation values more than once.

- If a person is in more than one reporting group, that person's total compensation is counted each time the business process encounters him or her in a group. Run the Group Overlapping report to prevent this type of double accounting.

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

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Groups”

Before You Begin

Before performing any of the setup steps, familiarize yourself with these tools:

- Cube Manager, which integrates with two third-party OLAP tools: Arbor Essbase and Cognos PowerPlay.
- Tree Manager.
- Group Build.

See Also

PeopleTools PeopleBook: Cube Manager

PeopleTools PeopleBook: Tree Manager

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Groups”

CHAPTER 3

Setting Up the Total Compensation Reporting Structure

This chapter provides an overview of how to structure total compensation reporting, including how to:

- Define rollup categories.
- Define compensation sources.
- Define compensation IDs.
- Set up your Compensation Tree.

Defining Rollup Categories

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

Here's how you define rollup categories:

1. Define the nodes and leaves of your Compensation Tree.
2. Define the tree.

It's possible to define compensation IDs and rollup categories as you build the Total Compensation Tree (TC Tree).

PeopleSoft Predefined Rollup Categories

The predefined rollup categories for the Compensation Tree are listed in the following table. Select or modify these categories, or create categories that reflect your organization's compensation plan. If you add a category with the Rollup Category page, use PeopleSoft Tree Manager to add it to the Compensation Tree.

Category Name	***Description***	***Category Name***	***Description***
ADD	ADD Plan	KAISER	Kaiser Medical

Category Name	Description	Category Name	Description
ALLOWANCES	Employee Allowances	LEAVE	Leave Plan
BAS-LIFE	Basic Life	LIFE	Life Insurance
BASEPAY	Base Pay Earnings rollup	LTD	Long Term Disability
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

Page Used to Define Rollup Categories

Page Name	Object Name	Navigation	Usage
TC Category (total compensation category)	TC_CATEGORY	Compensate Employees, Report Total Compensation, Setup, Rollup Category, TC Category	Define additional rollup categories for the Compensation Tree.

Defining Compensation Sources

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

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

Here's how you define compensation sources:

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

2. Add or modify the compensation IDs.

PeopleSoft Predefined Compensation Sources

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

Warning! 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 Administration	Extract	HR_TCBENEF	Benefits and Deductions
COMP	PeopleSoft Human Resources	Extract	HR_TCMCOMP	Components of Pay are extracted and 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

Page Used to Define Compensation Sources

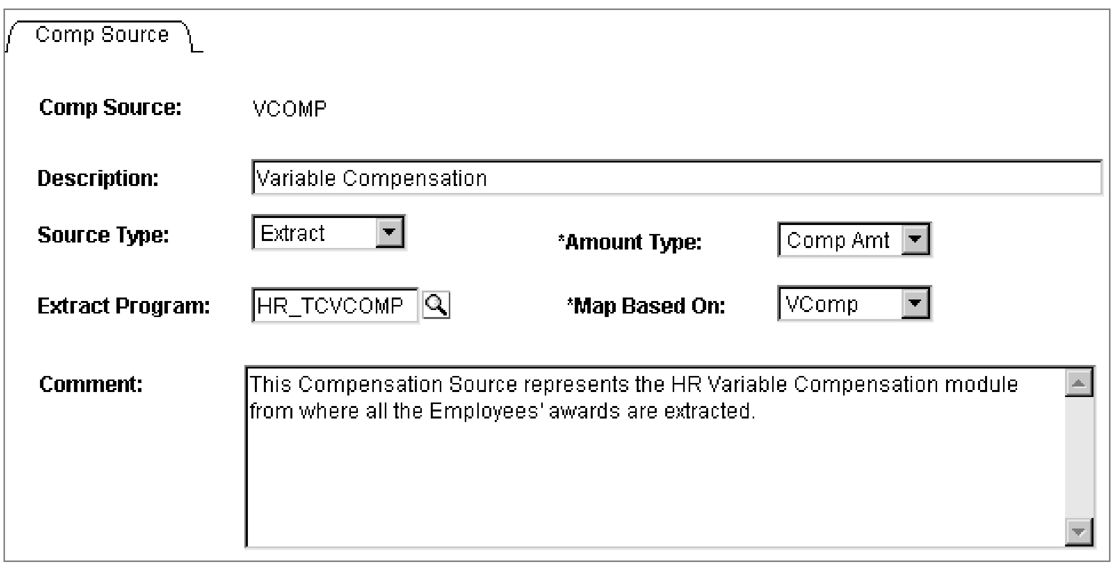
Page Name	Object Name	Navigation	Usage
Compensation Source	TC_COMPSOURCE	Compensate Employees, Report Total Compensation, Setup, Compensation Source	Define additional sources of total compensation data, such as ad hoc employee or ad hoc organization awards. Do not modify any existing sources.

See Also

Adding or Modifying Compensation IDs

Defining Compensation Sources

Access the Comp Source page.



Comp Source page

Source Type

Select from the list of translate values. ***Extract*** refers to the predefined compensation sources delivered with the system because they map to Application Engine extract programs.

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

Amount Type	Select either ***Comp Amt*** (compensation amount) or ***Payroll Amt*** (payroll amount). The amount type that you select is based on the source type. If you select ***Payroll*** as the Source Type, select ***Payroll Amt***. For the other extracts, select ***Comp Amt***. Use the amount type to ensure that there is no double accounting between the compensation amounts extracted from HR and the payroll amounts. If the Source Type is ***Extract*** and the Extract Program is one of the payroll extracts, Amount Type is unavailable and set to ***Payroll Amt***. If the Source Type is *Extract* and the Extract Program is one of the benefit extracts, Amount Type is unavailable and set to ***Comp Amt***. If the Source Type is ***Ad-Hoc Org*** or ***Ad-Hoc Emp***, Extract Program is unavailable.
Extract Program	This is normally unavailable for selection. Ad hoc entries don't need extractions. Select ***Extract*** for the Source Type, and the Extract Program field is active. You already defined the Extract Program name for each predefined compensation source. The Extract Program name is 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 table in PeopleSoft Predefined Compensation Sources indicates the mapping for the predefined sources.

See Also

PeopleSoft Predefined Compensation Sources

Defining Compensation IDs and Mapping Extract Data

There are many compensation IDs that make up your company's Compensation Tree. Predefined compensation IDs are provided. You modify these or create new ones to fit your company's Compensation Tree. If you add ad hoc employee or organization awards, create compensation IDs for those awards.

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

Once you have determined which predefined compensation IDs you need to modify to fit your tree:

1. Modify the compensation IDs or add new compensation IDs.
2. Map new compensation IDs to compensation sources.

   This might require accessing an additional page to complete the mapping.

See Also

Defining Compensation Sources

PeopleSoft Predefined Compensation IDs

The predefined compensation IDs are listed with their mapping in the following table.

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

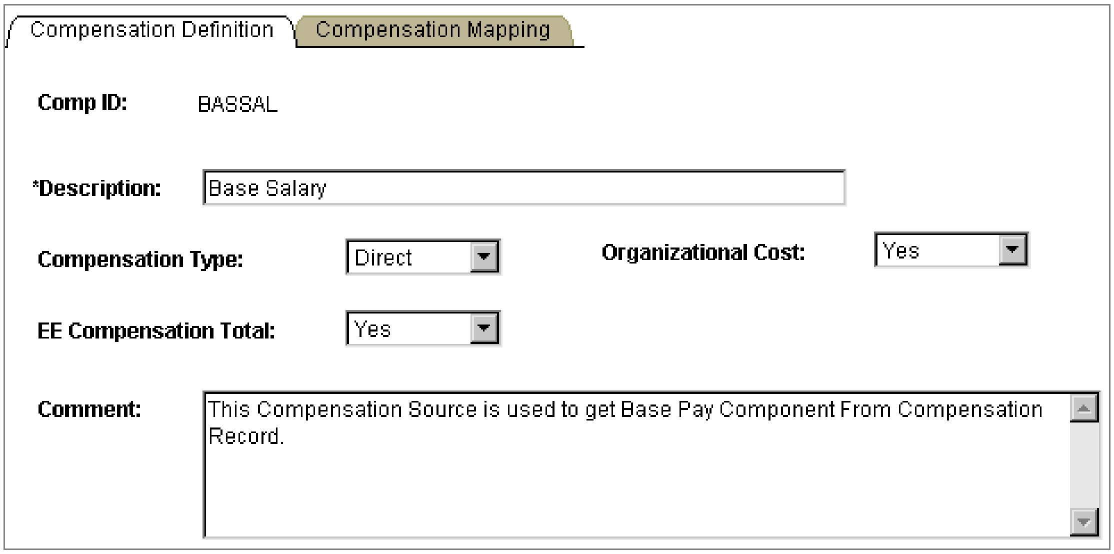
Comp ID	**Mapping (Sources)**	**Comp ID**	**Mapping (Sources)**
LTD-EE	Benefits and Deductions	BASE_PCT	Multiple Components
LTD-ER	Benefits and Deductions	BASE_PTS	Multiple Components
MED-BCB-CR	Benefits and Deductions	NON_BS_FLT	Multiple Components
MED-BCB-EE	Benefits and Deductions	NON_BS_HR	Multiple 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
SAV-ER-AT	Benefits and Deductions	INCENTIVE	Var Comp
SAV-ER-BT	Benefits and Deductions		

Pages Used to Define Compensation IDs

Page Name	**Object Name**	**Navigation**	**Usage**
Compensation Definition	TC_COMP_DEFN	Compensate Employees, Report Total Compensation, Setup, Compensation, Compensation Definition	Add or modify compensation IDs.
Compensation Mapping	TC_COMP_MAP	Compensate Employees, Report Total Compensation, Setup, Compensation, Compensation Mapping	Map new compensation IDs to their compensation sources.

Adding or Modifying Compensation IDs

Access the Compensation Definition page.



Compensation Definition page

Compensation Type

Indicate by selecting from the list of translate values.

Direct: Cash payment awards such as base pay, shift differentials, profit sharing, incentive pay, and bonuses.

Indirect: Non-cash compensation awards such as company-paid medical, dental, vision, disability, life insurance, holiday leave, vacation leave, sick leave, and employee services and privileges (club memberships, parking, holiday gifts).

Organizational Cost

Specify if this is employer paid or employee paid. Doing this ensures that 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 total organizational costs.

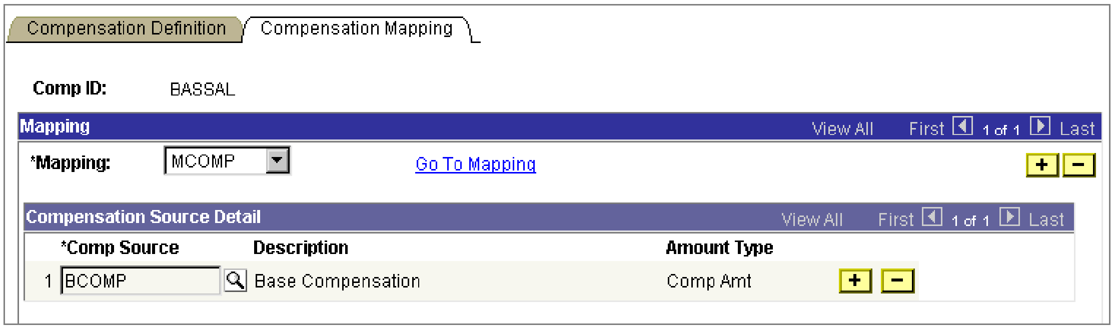
EE Compensation Total (employee compensation total)

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.

Mapping Compensation IDs

Access the Compensation Mapping page.



Compensation Mapping page

Mapping	Select a value from the translate list: ***Ben/Deduct, CAN Taxes, Earnings, MCOMP, No Mapping, USA Taxes, Vcomp***. See the table in the following section, Pages Used for Mapping Compensation. 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 compensation IDs, select ***No Mapping.***
Comp Source (compensation source)	Select from the translate list. The available values are limited based on the selected Mapping value.
Amount Type	The available values are limited based on the selected Comp Source.
Go To Mapping	Click this link to access various pages where you can view or modify further details about what the extraction program retrieves, as specified by the value in the Mapping field.

Pages Used for Mapping Compensation

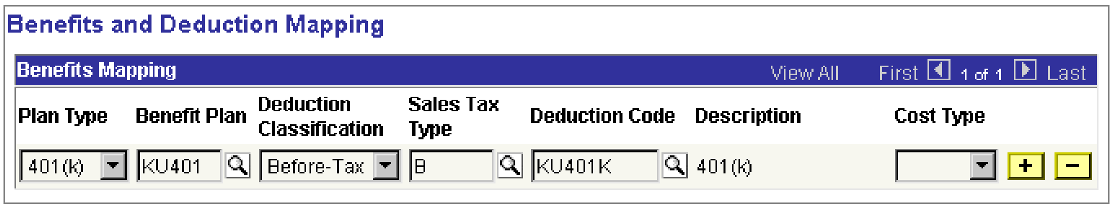
The following table lists the mapping field values and their associated pages. Use the pages to select information that you want extracted into the warehouse as part of the compensation ID. Access these pages by clicking the **Go To Mapping** link on the Compensation Mapping page.

Mapping Field Value	***Object Name***	***Compensation Mapping Page Name***
Ben/Deduct	TC_MAP_BENEFIT_SEC	Benefits Mapping
CAN Taxes	TC_MAP_TAX_CAN_SEC	Canadian Taxes Mapping
Earnings	TC_MAP_EARN_SEC	Earnings Code Mapping
MCOMP	TC_MAP_EARN_SEC	Multiple Components Mapping
No Mapping		(No mapping)
USA Taxes	TC_MAP_TAX_SEC	U.S. Taxes Mapping

Mapping Field Value	***Object Name***	***Compensation Mapping Page Name***
VComp	TC_MAP_VCOMP_SEC	Variable Compensation Mapping

Mapping Benefits and Deductions

Access the Benefits Mapping page.



Benefits Mapping page

Plan Type Select 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 from the list of prompt values. The values come from the Benefit/Deduction Program Table.

Deduction Classification Select from the list of prompt values. The values come from the Deduction Table.

Sales Tax Type Select from the list of translate values.

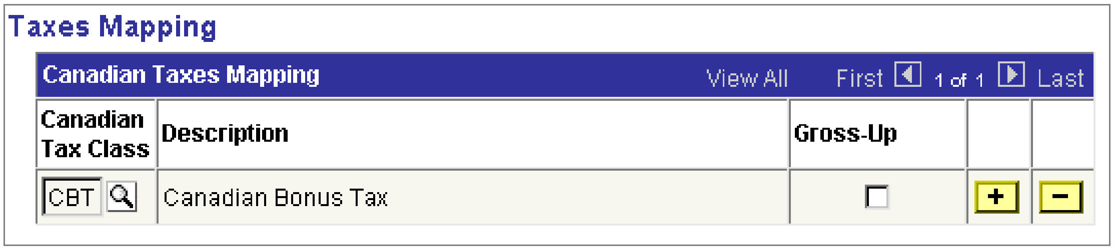
Deduction Code Select from the list of prompt values. The values come from the Deduction Table.

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

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

(CAN) Mapping Taxes

Access the Canadian Taxes Mapping page.



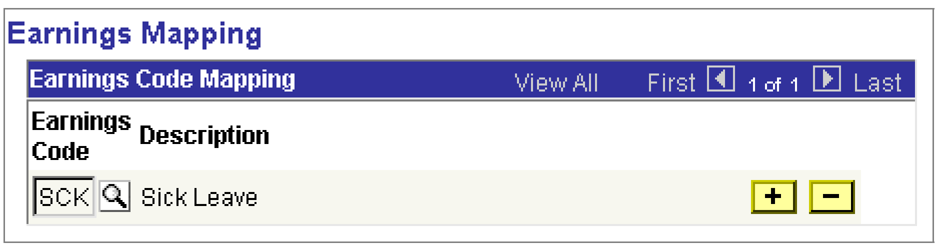
Canadian Taxes Mapping page

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

Gross-Up Select 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.

Mapping Earnings Code

Access the Earnings Code Mapping page

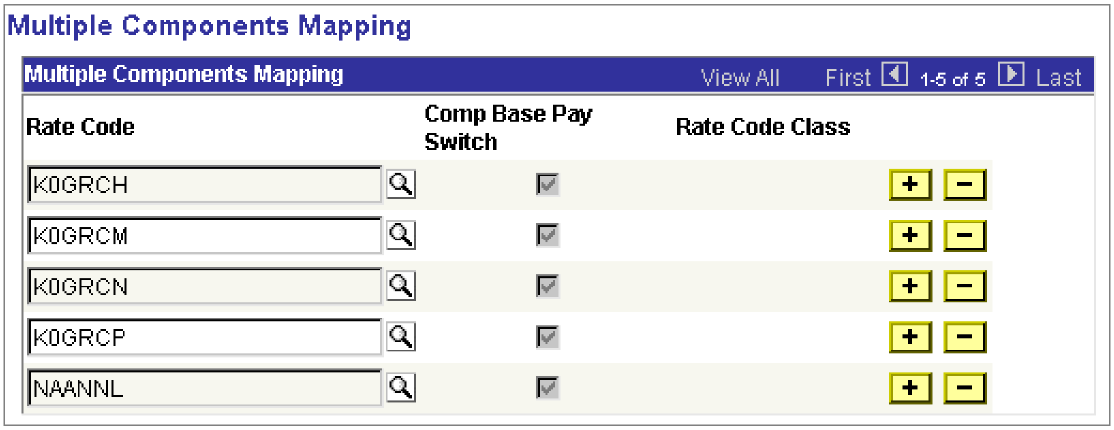


Earnings Code Mapping page

Earnings Code Select from the list of prompt values. The values come from the Earnings Code table. To map multiple codes, insert additional rows.

Mapping Multiple Components

Access the Multiple Components Mapping page.



Multiple Components Mapping page

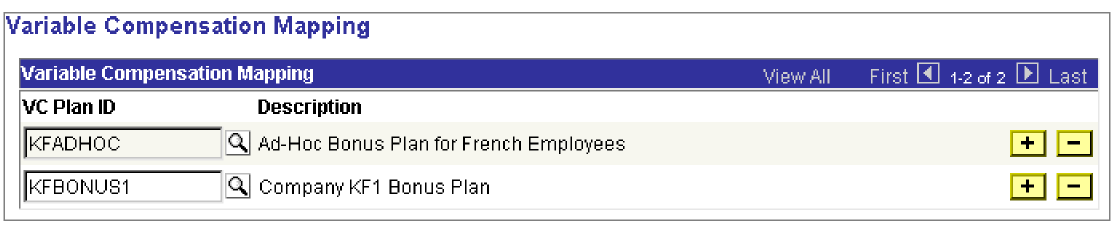
Rate Code	Select from the list of translate values.
Comp Base Pay Switch (compensation base pay switch)	Indicates whether a component of pay is included in the Base Pay calculation for an employee.
Rate Code Class	This appears only when the Rate Code is associated with a rate code class.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working with Multiple Components of Pay"

Mapping Variable Compensation

Access the Variable Compensation Mapping page.

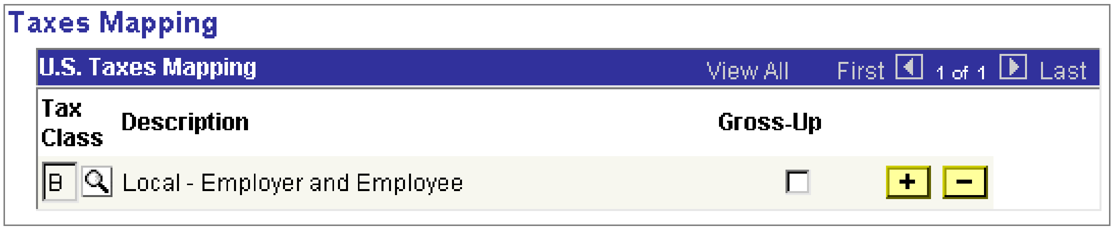


Variable Compensation Mapping page

VC Plan ID (variable compensation plan ID)	Select from the list of prompt values. The values come from the Variable Compensation Plan table.

(USA) Mapping U.S. Taxes

Access the U.S. Taxes Mapping page.



U.S. Taxes Mapping page

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

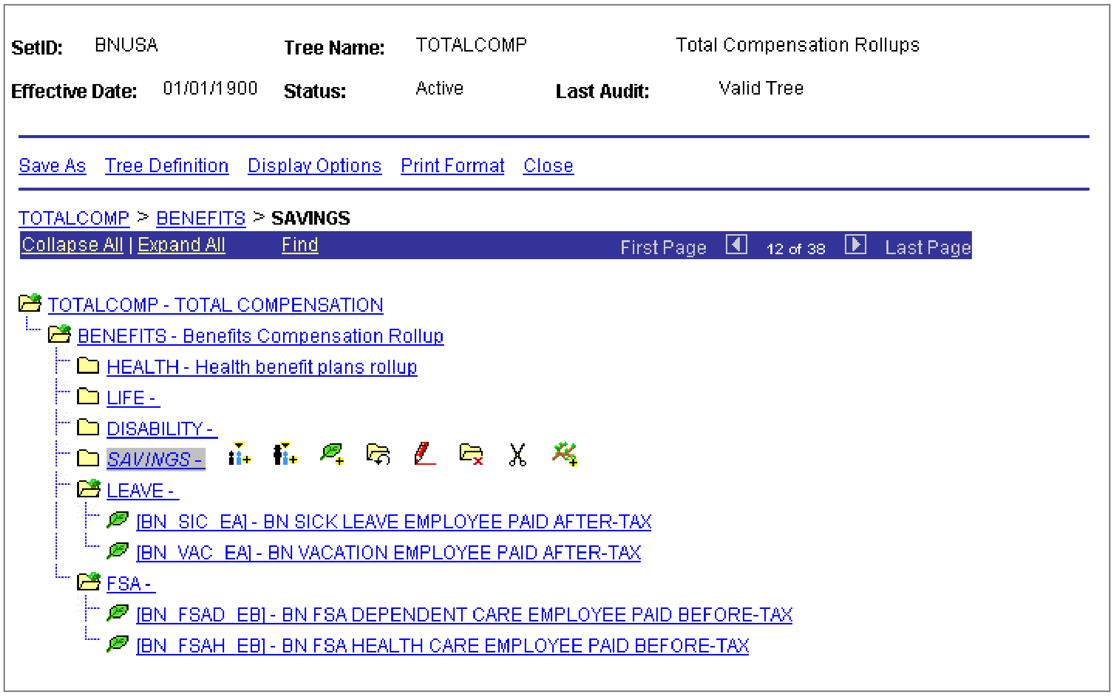
Gross-Up — Select if your company pays taxes for the employees on this tax class and you want that amount to be extracted into your data warehouse.

Setting Up the Compensation Tree

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

Note. You set up your tree—arrange the compensation IDs and rollup categories—before you run any of the extraction programs. If you do not, the joins fail and no data is extracted from the warehouse.

The following illustration shows the predefined sample tree:



Compensation Tree

See Also

PeopleTools PeopleBook: Tree Manager

CHAPTER 4

Defining Reporting Groups

This chapter provides an overview of reporting groups and assumes that you are familiar with the concept of building groups.

Understanding Reporting Groups

Because of your specific compensation reporting needs, the groups that you build using the Report Total Compensation business process will probably differ from any group that you build throughout PeopleSoft HRMS. For clarity, we call these groups reporting groups. For example, a compensation manager wants a report on her company's two industries, so she sets 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. Avoid this by running the Group Build Overlapping Groups report.

Here's how to build a reporting group:

1. Use the Group Build pages to build groups.
2. To ensure that the populations in your groups don't overlap, use the Group Member Overlap report.
3. Use the groups to set up total compensation reporting plans.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Groups”

“Setting Up Total Compensation Reporting Plans”

CHAPTER 5

Setting Up Total Compensation Reporting Plans

This chapter describes how to:

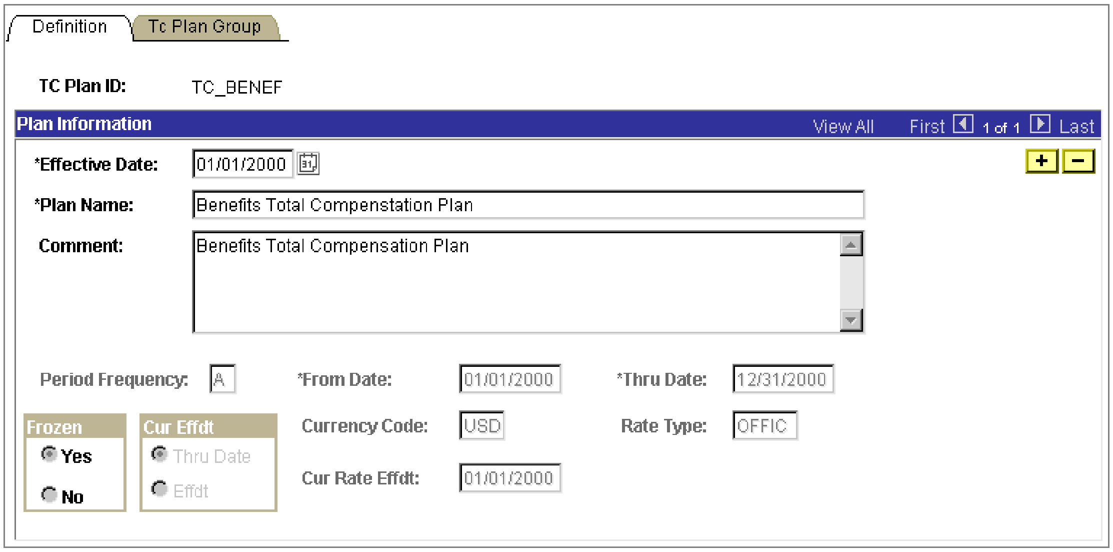
- Create, review and update a total compensation reporting plan.
- Associate a tree and group IDs to a reporting plan.

Pages Used to Set Up Total Compensation Reporting Plans

Page Name	***Object Name***	***Navigation***	***Usage***
Reporting Plan - Definition	TC_PLAN	Compensate Employees, Report Total Compensation, Setup, Reporting Plan, Definition	Create, review, or update a reporting plan.
Reporting Plan - Tc Plan Group	TC_PLAN_GRP	Compensate Employees, Report Total Compensation, Setup, Reporting Plan, Tc Plan Group	Associate a tree and group IDs to a reporting plan.

Creating, Reviewing, and Updating a Plan

Access the Reporting Plan - Definition page.



Reporting Plan - Definition page

Period Frequency

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

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

From Date

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

Thru Date

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

Frozen

The status of the reporting plan.

Selecting ***No*** means the plan is not frozen.

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

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

Cur Effdt (currency effective date)

Select the date that you want the system to use in order to calculate the exchange rate. Use either the plan's **Thru Date,** or any **Efftd** (effective date) in the **Cur Rate Efftd** field.

Rate Type

Select one: ***Commercial, Financial, Floating, Official, Free Market,*** or ***Spot Market.*** The values come from the Currency Rate Type Table.

Select here the same rate type that you specify throughout the PeopleSoft HRMS application.

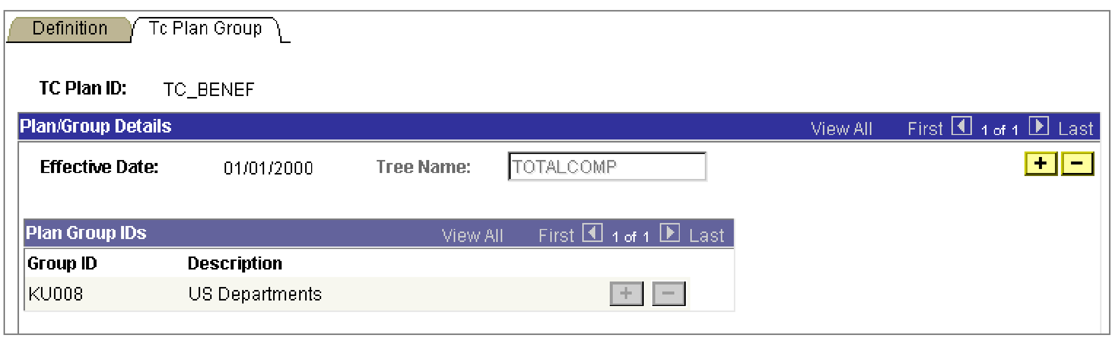
Cur Rate Efftd (currency rate effective date)

The system looks in the Currency Rate Table and uses the currency exchange rate with an effective date closest to but less than the **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.

Warning! 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, then map both currencies to each other. Map the currencies at **Define Business Rules, Define General Options, Setup, Market Rates.**

Associating Trees and Group IDs to a Plan

Access the Reporting Plan - Tc Plan Group page.



Reporting Plan -TC Plan Group page

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.

Add groups as needed for this plan. Ensure that an individual isn't in more than one group.

See Also

"Defining Reporting Groups"

C H A P T E R 6

Setting Up the OLAP Cubes

This chapter provides an overview of OLAP reporting and cubes and tells you how to:

- Make a Total Compensation Department Tree.
- Copy and or create the ALL_TIME Tree.

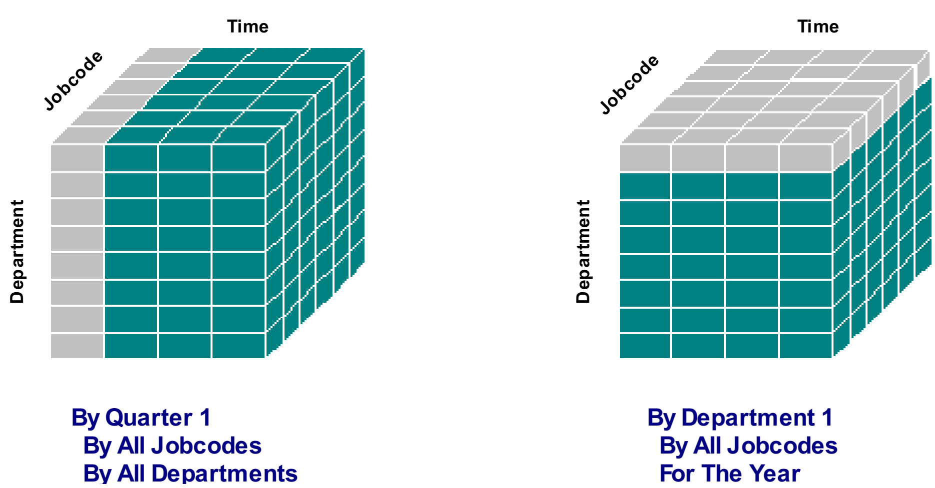
Note. The PeopleTools Cube Manager is designed to be OLAP platform independent and integrate with both Cognos PowerPlay and Arbor Essbase. The Compensation cube and Headcount/FTE cube are designed for use with PowerPlay.

Overview of OLAP Reporting

This section assumes that you've read the PeopleSoft Cube Manager PeopleBook.

With Online Analytical Processing (OLAP) reporting, you view compensation data from different axis points and move easily from one view to another.

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



Representational Total Compensation cube and dimensions

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

PeopleSoft Predefined Dimensions and Measures

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

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

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.

Dimension	***In Which Cubes?***	***Rollup Type***	***Comments***
TC_BUS_UNIT	Both	Query	Retrieves the business units and their descriptions. All the business units are rolled up into the All Business Units umbrella. This query also retrieves the All Business Units text from the Message Catalog for globalization purposes.
TC_CATEGORY	Both	Query	Retrieves the employees labor agreement and categorization information.
TC_COMPANY	Both	Query	Grouped by country and company code. You usually won't alter the query.
TC_COMPENSATIO N	Compensatio n	Tree	You modified this tree when you set up the total compensation reporting structure.
TC_DEPT	Both	Tree	TC_DEPT trees are copies of standard department trees in which the department IDs are the concatenation of the setID with the standard dept ID. For instance, Department 10001 on the US Department Tree would be Department USA10001 in the related TC Department Tree.

Dimension	***In Which Cubes?***	***Rollup Type***	***Comments***
TC_EE_COMPTOTAL	Compensation	Query	Determines whether or not you've specified that the comp ID is included in the compensation total. 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.
TC_LOCATION	Both	Query	Grouped by country, state/province, and location code. You usually won't alter the query.
TC_POSITION	Both	Query	Grouped by position.
TC_SALARY_LEVEL	Both	Query	Grouped by salary administration plan and salary grade. You usually won't alter the query.
TC_TIME	Both	Tree	Modify this query to match the ALL_TIME tree.
TC_TYPE	Compensation	Query	Determines whether or not 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.

See Also

"Setting Up the Total Compensation Reporting Structure"

Creating the Total Compensation Department Tree

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.

Pages Used to Create a Department Tree

Page Name	*Object Name*	*Navigation*	*Usage*
Department Tree	TC_DEPT_TREE	Compensate Employees, Report Total Compensation, Setup, Department Tree	Duplicate your Security Tree to create a Department Tree. The new tree is named TC_DEPT and appears with the other HR trees in PeopleSoft Tree Manager.

Filling in the All_TIME Tree

PeopleSoft HRMS provides the skeleton ALL_TIME Tree, which represents the time dimension for your cubes. Use PeopleSoft Tree Manager to construct the tree to meet your needs and to define how time periods roll up. This is how you tell the system that 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.

You also have the option of using dynamic range to determine your time period rollups at run time. The time rollup periods are determined at run time based on the reporting plan. The length of each time roll-up period matches the frequency of the reporting plan. You do not need to create a TC_TIME Tree for each reporting period. For example, if a plan from 01/01/2000 thru 12/31/2010 has a frequency of Annual, the rollup time periods would be actually be 10 calendar years (2000 to 2010).

See Also

PeopleTools PeopleBook: Tree Manager

PeopleTools PeopleBook: Cube Manager

CHAPTER 7

Populating Reporting Groups

The chapter provides an overview of populating reporting groups and tells you how to populate those groups.

Understanding How to Populate Reporting Groups

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

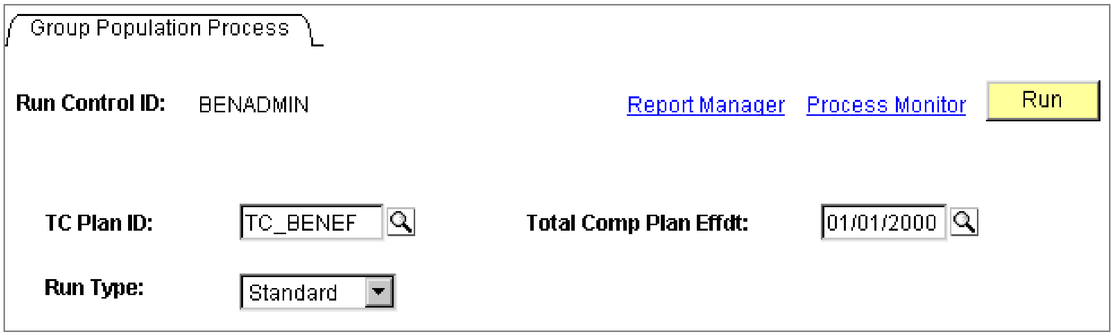
This file is loaded by Cognos in the cube. This way, you can use the multi-currency function in Cognos Power Play and switch between currencies. Compensation and payroll amounts can be displayed in any currency from the exchange file.

Pages Used to Populate Reporting Groups

Page Name	***Object Name***	***Navigation***	***Usage***
Group Population Process	TC_GROUP_RUNCTL	Compensate Employees, Report Total Compensation, Process, Group Population Process	Populate the reporting groups that you define.

Populating Reporting Groups

Access the Group Population Process page.



Group Population Process page

TC Plan ID (total compensation plan ID)	Select from the available options.
Total Comp Plan Effdt (total compensation plan effective date)	Select from the available options.
Run Type	Select a type: ***Standard*** run populates the TC_POPULATION table with all the employees from all the groups associated with the specified TC Plan ID. If you are rerunning this process, a ***Standard*** run deletes all previous information and enters new data into the table. A ***Delete*** run deletes all the group records.

See Also

PeopleTools PeopleBook: Process Scheduler

CHAPTER 8

Extracting Total Compensation Data

This chapter gives an overview of data extraction and shows you how to extract compensation data. We assume that you've set up your total compensation reporting structure.

See Also

"Setting Up the Total Compensation Reporting Structure"

Understanding Data Extraction

After setting up the total compensation reporting structure and defining a reporting plan, fill the warehouse by extracting data from PeopleSoft Benefits, Human Resources, and Payroll for North America. There are four possible sources for data extraction: payroll, multiple components of pay, variable compensation, and benefits. The processes separately store amounts extracted from multiple components of pay and payroll earnings to prevent double accounting.

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

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

To extract data, run the extractions located on two pages. 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 Administration.
HR_TCMCOMP	COMP	Extracts base pay data from PeopleSoft Human Resources.
HR_TCVCOMP	VCOMP	Extracts earnings and variable compensation from PeopleSoft Human Resources.

Process Name	***Compensation Source***	***Source Application***
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 U.S. taxes from PeopleSoft Payroll for North America.

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

To calculate target awards, check the Calculate Target Awards check box on the Extraction Run Control page.

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

Once the extraction processes are running, view the process status with the Plan Inquiry page.

See Also

PeopleSoft Human Resources PeopleBook: Manage Variable Compensation

PeopleSoft Human Resources PeopleBook: Manage Variable Compensation, “Calculating Allocations and Awards,” Determining Allocations for Total Compensation Reporting

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Note. If you want to modify your Report Total Compensation business process to work with other third-party applications and you need to develop modified trees, transaction pages, and Application Engine extracts, see your Account Manager.

Extracting Payroll Data

The data extract process for PeopleSoft Payroll for North America 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.

Warning! Payroll data are *actuals*, meaning the process goes out and retrieves the actual, or real, amount. Processing is time-consuming. Consider running payroll extracts monthly or quarterly.

Extracting Compensation Data

Because compensation data resides throughout PeopleSoft HRMS, you might run several extract processes to obtain a complete analysis.

In this section, we discuss how to:

- Understand the multiple components of pay process.
- Understand the variable compensation process.
- Extract benefits using the benefits process.

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

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

Understanding the 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 as defined on the Compensation Mapping page.

See Also

“Setting Up the Total Compensation Reporting Structure,” Mapping Compensation IDs

Understanding the Variable Compensation Process

This process retrieves awards coming from any potential plans defined and managed in the Manage Variable Compensation business process that have been selected on the Variable Compensation Mapping page.

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 plan 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. (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 as defined on the Compensation Mapping page.

Extracting Benefits Using the Benefits Process

To extract benefits data using the benefits process:

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

   View error messages with the Calculation Process Messages page.

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

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 that is defined in your reporting plan. It calculates the employee and employer share of the prices. If you run 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 that you specified on the Reporting Plan - Definition Page.

Note. The benefit calculation results are accurate if you select Monthly as the period frequency. If you select 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. 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 in the TC_POPULATION Table, which is filled from the group population process. The process 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 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, are taken in one 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.

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

See Also

"Setting Up Total Compensation Reporting Plans," Creating, Reviewing, and Updating a Plan

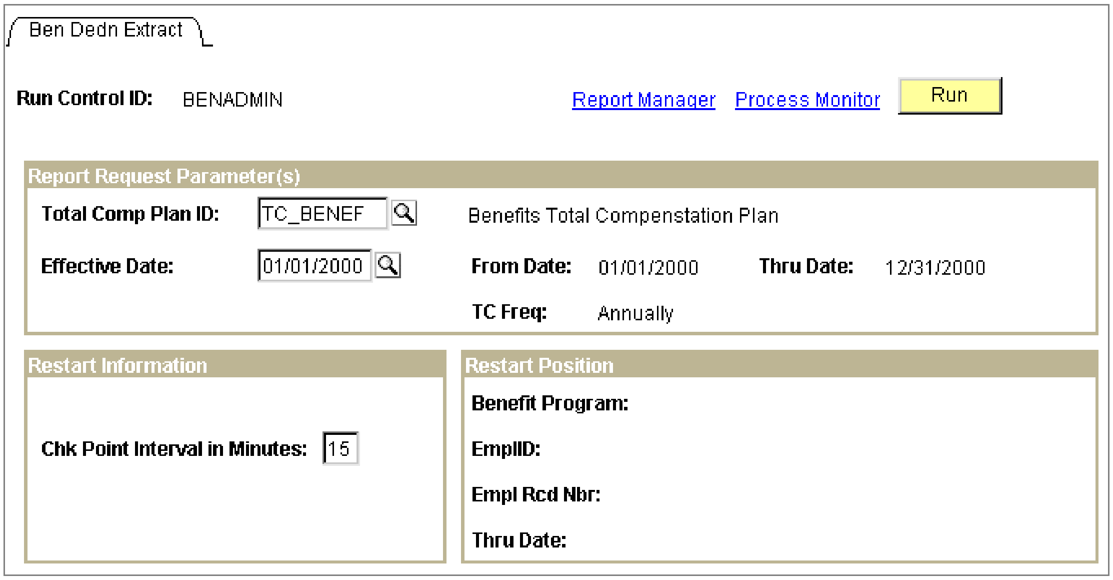
Pages Used to Extract Total Compensation Data

Page Name	***Object Name***	***Navigation***	***Usage***
Ben Dedn Extract	RUN_CNTL_TOTL_COMP	Compensate Employees, Report Total Compensation, Process, Benefits Calculation	Run the benefits calculation.
Calculation Process Messages	CALC_MESSAGE	Compensate Employees, Report Total Compensation, Inquire, Benefits Calculation Message	Display information about any errors that occurred during the benefits calculation process.
Extract	TC_RUN_CNTL_PNL	Compensate Employees, Report Total Compensation, Process, Extract	Run the extracts and view the run history.
Plan Inquiry	TC_PLAN_INQ_PNL	Compensate Employees, Report Total Compensation, Inquire, Plan Inquiry	View the status of the extracts for a given reporting plan.

Running the Benefits Calculations

This COBOL process writes to the PS_TOTAL_DED Table.

Access the Ben Dedn Extract page.



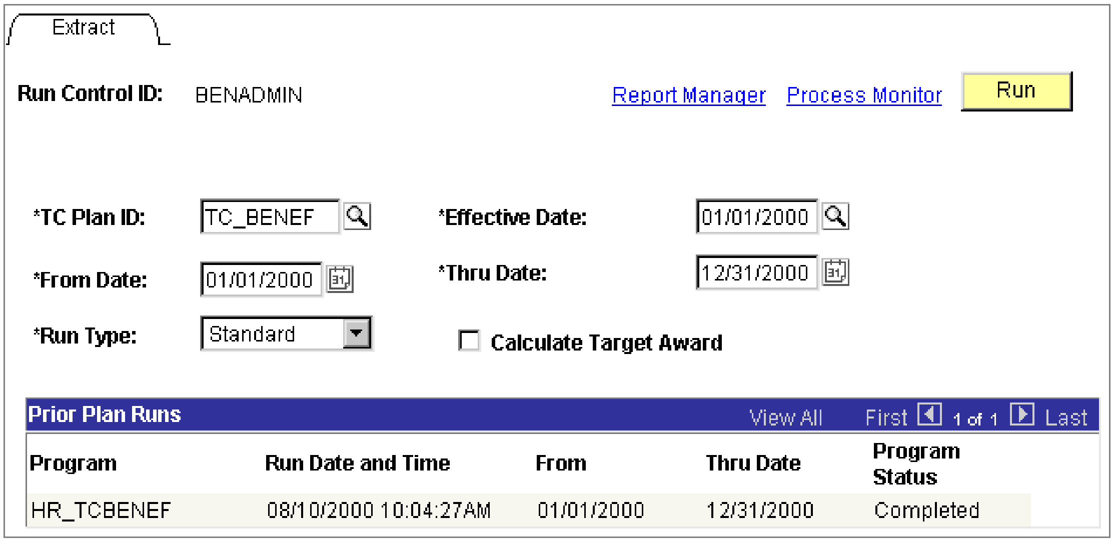
Ben Dedn Extract page

Total Comp Plan ID	Select the plan ID and **Effective Date** for the calculation. The plan's description appears.
Chk Point Interval in Minutes(check point interval in minutes)	Enter the restart information in minutes.

Running Extracts and Viewing the Run History

These application engine processes write data to the TC_EE_DETAIL Table.

Access the Extract page.



Extract page

Run Type

Select ***Standard*** for a normal, first time run. Once you begin the run, the report plan status is frozen; you cannot modify the interval dates or plan groups.

The only way to change the reporting plan status back to unfrozen is to run the extracts in ***Delete*** mode.

Select ***Delete*** 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. Select ***Standard*** to retrieve the information.

Calculate Target Award

Select to include data from the determine allocation process from the Manage Variable Compensation business process.

If you clear this check box, the TCVARCMP process extracts data from just the VC_AWARD Table. For example, Q1 and Q2 contain data from VC_AWARD, but Q3 and Q4 do not. If the check box is selected, targeted awards for Q3 and Q4 are calculated and included.

Prior Plan Runs

The fields in this group box are populated with the history of this plan's previous runs.

See Also

PeopleTools PeopleBook: Process Scheduler

CHAPTER 9

Including Ad Hoc Information in the Data Warehouse

This chapter provides an overview of ad hoc information and tells you how to add ad hoc information.

Understanding Ad Hoc Information

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.

Ad hoc data never needs to be extracted; it is immediately available for reports or inquiries.

Adding an Ad Hoc Award

1. Set up a compensation source using the Compensation Source Page.

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

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

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

4. Add ad hoc information on 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 viewing compensation data, processing OLAP cubes, or running reports.

See Also

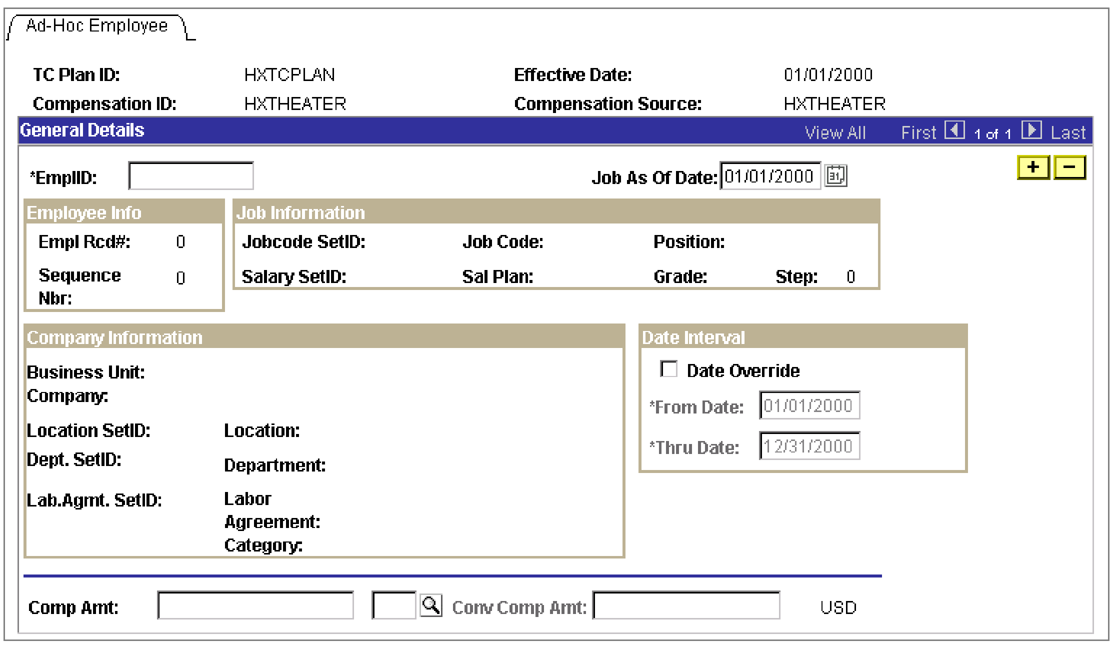
"Setting Up the Total Compensation Reporting Structure"

Pages Used to Add Ad Hoc Awards

Page Name	***Object Name***	***Navigation***	***Usage***
Ad Hoc Employee	TC_ADHOC_EMPL	Compensate Employees, Report Total Compensation, Use, Ad-Hoc Employee	Add ad hoc compensation for a small number of employees.
Ad Hoc Organization	TC_ADHOC_ORG	Compensate Employees, Report Total Compensation, Process, Ad-Hoc Organization	Add ad hoc compensation for a group of employees.

Adding Ad Hoc Information for an Employee

Access the Ad-Hoc Employee page.



Ad-Hoc Employee page

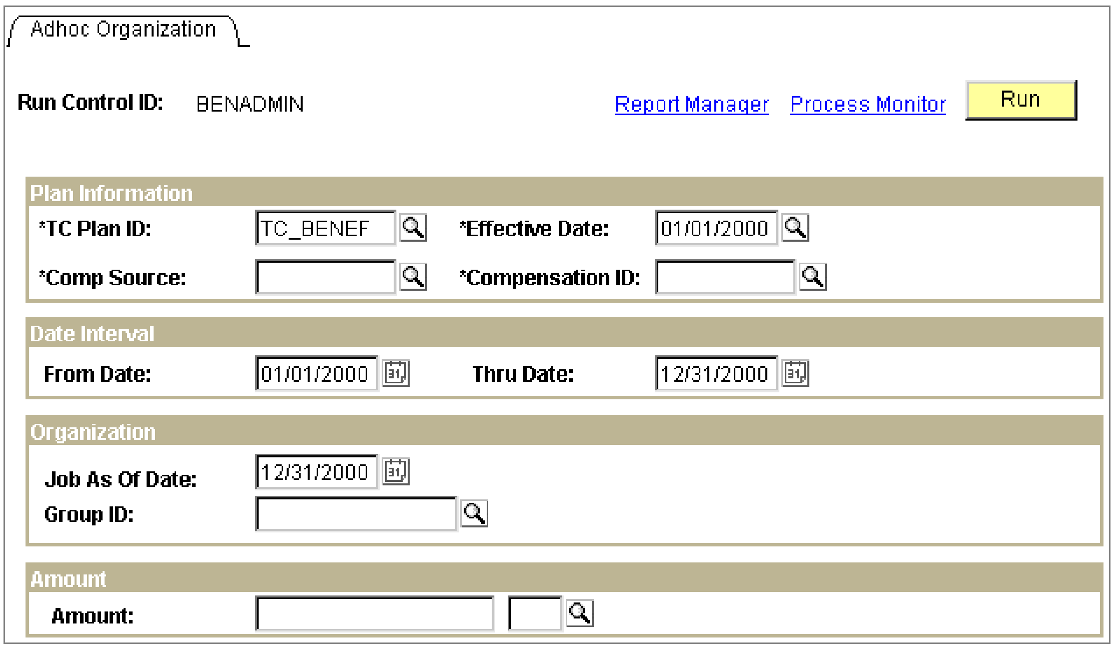
Job As Of Date — This date is used to default the employee, job and company information on this page.

Date Interval — The interval during which you're offering the award. Use the plan's dates (default values), or 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.

Comp Amount/Conv Comp Amt
Enter the compensation amount and the currency of the award for this employee. The system calculates the amount of this award converted into the reporting plan currency.

Adding Ad Hoc Information for a Group of Employees

Access the Adhoc Organization page.



Adhoc Organization page

Plan Information
Enter plan information relevant to this award.

Date Interval
Enter a **From Date** and **Thru Date** for this award.

Organization
Enter the **Job As Of Date** of the award and the **Group ID.**

Amount
Enter the amount of the award. This is the total amount awarded to every person associated with the group ID.

CHAPTER 10

Viewing Total Compensation Data

This chapter describes how to:

- View employee compensation data online.
- View compensation data in Excel.

Viewing Employee Compensation Data Online

Use the Employee Total Compensation inquiry page to view compensation data or to check the results of the Employee Compensation report before printing it.

See Also

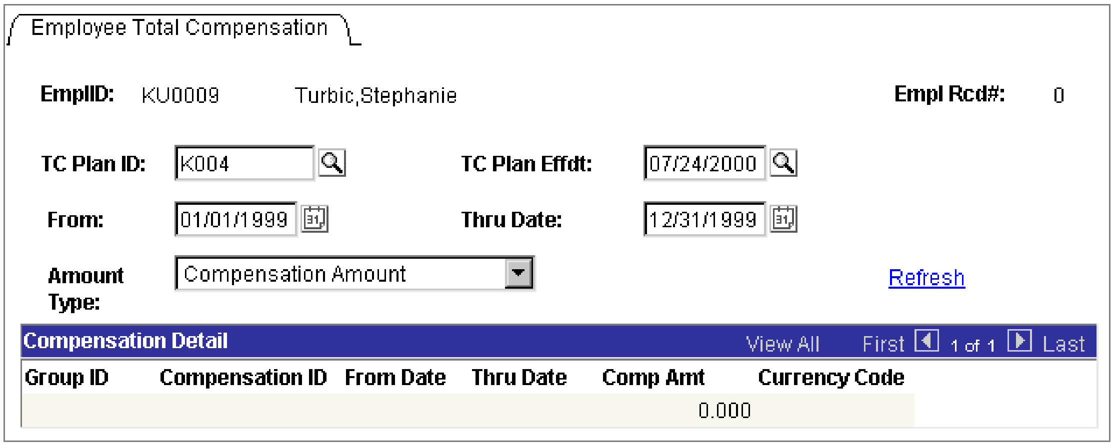
PeopleSoft Application Fundamentals for HRMS PeopleBook, Report Total Compensation Reports

Page Used to View Total Compensation Output

Page Name	***Object Name***	***Navigation***	***Usage***
Employee Total Compensation	TC_EE_COMP	Compensate Employees, Report Total Compensation, Inquire, Employee Total Compensation	View 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.

Viewing Employee Total Compensation

Access the Employee Total Compensation page.



Employee Total Compensation page

From/Thru Date — Enter the dates for this inquiry. You can inquire on a subset of the plan's period.

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

Refresh — Click this link when you enter or modify one of the parameters to load the associated data onto the page.

Compensation Detail — This group box contains the employee's compensation information.

Viewing Compensation Data in Excel

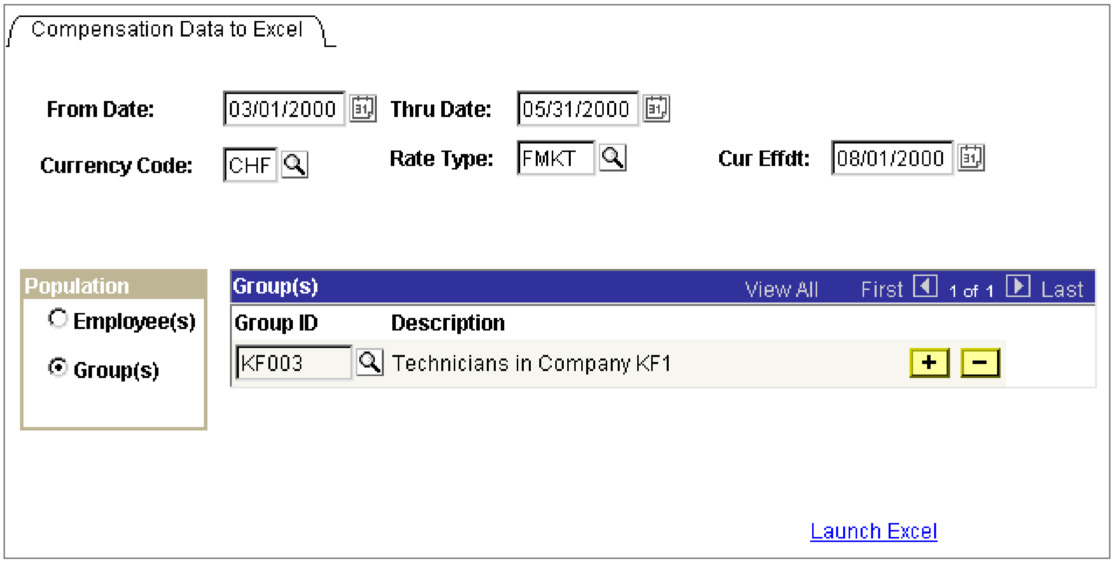
You can view in Excel any base and variable compensation information from PeopleSoft Human Resources. You can't view Benefits or Payroll information with this feature.

Page Used to View Compensation Data in Excel

Page Name	*Object Name*	*Navigation*	*Usage*
Compensation Data to Excel	TC_EXCEL_RUNCTL	Compensate Employees, Report Total Compensation, Inquire, Compensation Data to Excel	Launch Excel with information (base and variable pay) that you extract from PeopleSoft Human Resources.

Launching Excel

Access the Compensation Data to Excel page.



Compensation Data to Excel page

Population	Select whether you want **Employee(s)** or **Group(s)** in the results. If you select **Employee(s)**, you can select one or more EmplID. The employee's name appears. If you select **Group(s)**, you can select one or more **Group ID**. The group's description appears.

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. To view this on the client machine, the file needs to be FTP'd to the client. Set up an FTP server for read and write access to the default log output directory that is used.

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

C H A P T E R 1 1

Processing the OLAP Cubes

This chapter provides an overview of OLAP processing and tells you how to:

- Set the destination directory.
- Process OLAP cubes.

Understanding How to Process Cubes

To process cubes:

1. Set the destination directory.
2. Use the Cube Page to build the cube.
3. Analyze the results with an OLAP tool.

   View and analyze the Compensation and Headcount/FTE cubes with Cognos PowerPlay.

Note. You must process the Compensation cube and the Headcount/FTE cube from within the Report Total Compensation business process. View the cubes with PeopleSoft Cube Manager, but return to the Report Total Compensation business process when you're ready to process them.

See Also

"Setting Up the OLAP Cubes"

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.

Building Cubes

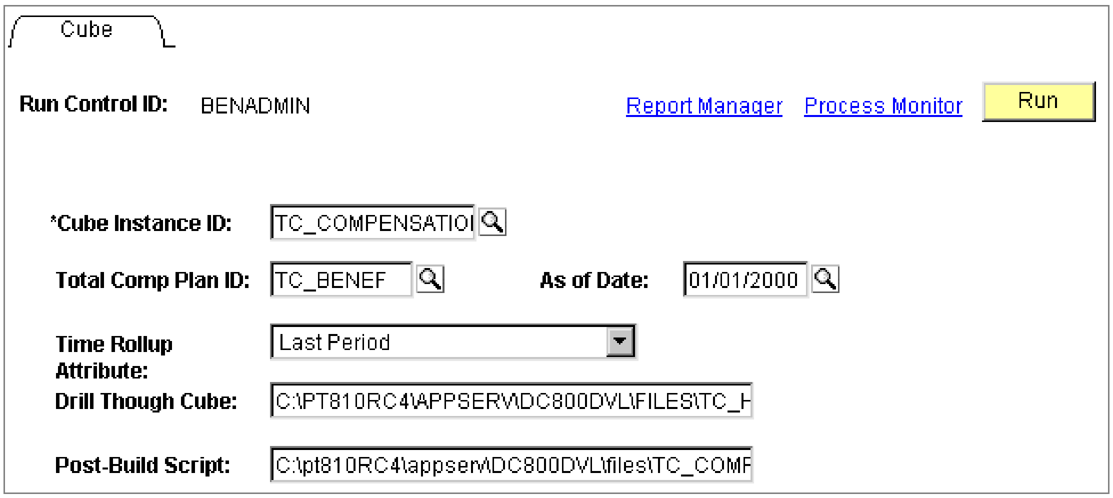
Build the OLAP cube after building the data warehouse.

Page Used to Build Cubes

Page Name	***Object Name***	***Navigation***	***Usage***
Cube	TC_RUNCNTL_CUBE	Compensate Employees, Report Total Compensation, Process, Cube	Build OLAP cubes.

Building an OLAP Cube

Access the Cube page.



Cube page

Cube Instance ID Select the cube that you want to process.

Total Comp Plan ID Select a total compensation plan ID.

As of Date Enter this, 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, for FTE values of four quarters to be averaged in a time rollup for the entire year, choose ***Average.*** For the last quarter value to be rolled up to represent the year, 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. Headcount appears by default if you are building the Compensation cube, while compensation appears if you are building the Headcount cube.

The path and file names appear by default from the log/output directory you used when you chose which cube to create. You can change the directory/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 can not drill through to it. Likewise, if you create the Headcount cube, the drill through cube should be the Compensation cube.

Post-Build Script Enter the path for the 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 appear by default at the log\output directory when the cube is chosen. For the Compensation cube, the filename must be TC_COMP_P.MDL and for the Headcount cube, the filename must be TC_HD_P.MDL. This is a required field.

See also

PeopleTools PeopleBook: Process Scheduler

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