



PeopleSoft 8.8

Human Resources PeopleBook: Report Total Compensation

December 2002

PeopleSoft 8.8
Human Resources PeopleBook:
Report Total Compensation
SKU HRMS88HTC-B 202

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.
Copyright 1988-2002 PeopleSoft, Inc. All rights reserved.

Printed in the United States.

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc. ("PeopleSoft"), protected by copyright laws and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this document is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this document, including the disclosure thereof.

PeopleSoft, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, PeopleTalk, and Vantive are registered trademarks, and Pure Internet Architecture, Intelligent Context Manager, and The Real-Time Enterprise are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners. The information contained herein is subject to change without notice.

Open Source Disclosure

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright (c) 1999-2000 The Apache Software Foundation. All rights reserved. THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

PeopleSoft takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation.

Contents

General Preface

About This PeopleBook	vii
PeopleSoft Application Prerequisites.....	vii
PeopleSoft Application Fundamentals.....	vii
Related Documentation.....	viii
Obtaining Documentation Updates.....	viii
Ordering Printed Documentation.....	viii
Typographical Conventions and Visual Cues.....	ix
Typographical Conventions.....	ix
Visual Cues.....	x
Comments and Suggestions.....	xi
Common Elements in These PeopleBooks	xi

Preface

PeopleSoft Human Resources: Report Total Compensation Preface.....	xiii
PeopleSoft Application Fundamentals.....	xiii
PeopleBook Structure.....	xiii

Chapter 1

Getting Started With PeopleSoft Human Resources: Report Total Compensation... ..	1
Report Total Compensation Business Processes.....	1
PeopleSoft Human Resources: Report Total Compensation Integrations.....	1
PeopleSoft Human Resources: Report Total Compensation Implementation.....	2
Setting Up PeopleSoft HRMS Fundamental Tables.....	2
Setting Up Core PeopleSoft Human Resources: Report Total Compensation Tables.....	2
Setting Up Additional PeopleSoft Human Resources: Report Total Compensation Tables.....	3

Chapter 2

Understanding Total Compensation Reporting.....	5
Report Total Compensation Business Processes.....	5
PeopleSoft Human Resources: Report Total Compensation Integrations.....	6
Setting Up Total Compensation Reporting.....	6

Chapter 3

Using the Total Compensation Reporting Business Process.....	7
Understanding the Output of Total Compensation Reporting.....	7
Understanding the Reporting Process.....	8
Understanding the Process Sequence.....	8
Understanding the Compensation Tree.....	9
Understanding Compensation IDs and Their Sources.....	10
Understanding Time Periods.....	10
Preventing Double Accounting.....	11

Chapter 4

Setting Up the Total Compensation Reporting Structure.....	13
Before You Begin.....	13
Defining Rollup Categories.....	13
Understanding PeopleSoft Predefined Rollup Categories.....	14
Page Used to Define Rollup Categories.....	15
Defining Compensation Sources.....	15
Understanding PeopleSoft Predefined Compensation Sources.....	15
Page Used to Define Compensation Sources.....	16
Defining Compensation Sources.....	16
Defining Compensation IDs and Mapping Extract Data.....	18
Understanding PeopleSoft Predefined Compensation IDs.....	18
Pages Used to Define Compensation IDs.....	20
Understanding Mapping Compensation.....	20
Adding or Modifying Compensation IDs.....	21
Mapping Compensation IDs.....	22
Mapping Benefits and Deductions.....	23
(CAN) Mapping Taxes.....	23
Mapping Earnings Code.....	24
Mapping Multiple Components.....	24
Mapping Variable Compensation.....	24
(USA) Mapping U.S. Taxes.....	25
Setting Up the Compensation Tree.....	25

Chapter 5

Defining Reporting Groups.....	27
Understanding Reporting Groups.....	27

Chapter 6

Setting Up Total Compensation Reporting Plans.....	29
Defining a Reporting Plan and Associating to a Group ID.....	29
Pages Used to Set Up Total Compensation Reporting Plans.....	29
Creating, Reviewing, and Updating a Plan.....	29
Associating Trees and Group IDs to a Plan.....	31

Chapter 7

Setting Up the OLAP Cubes.....	33
Understanding OLAP Reporting.....	33
Understanding PeopleSoft Predefined Dimensions and Measures.....	34
Creating the Total Compensation Department Tree.....	36
Pages Used to Create a Department Tree.....	36
Filling in the All_TIME Tree.....	36

Chapter 8

Populating Reporting Groups.....	39
Populating Reporting Groups.....	39
Pages Used to Populate Reporting Groups.....	39
Populating Reporting Groups.....	39

Chapter 9

Extracting Total Compensation Data.....	41
Understanding Data Extraction.....	41
Extracting Payroll Data.....	43
Extracting Compensation Data.....	43
Pages Used to Extract Total Compensation Data.....	44
Understanding the Multiple Components of Pay Process.....	44
Understanding the Variable Compensation Process.....	44
Extracting Benefits Using the Benefits Process.....	45
Running the Benefits Calculations.....	46
Running Extracts and Viewing the Run History.....	47

Chapter 10

Including Ad Hoc Information in the Data Warehouse.....	49
Understanding Ad Hoc Information.....	49

Adding an Ad Hoc Award.....	49
Pages Used to Add Ad Hoc Awards.....	50
Adding Ad Hoc Information for an Employee.....	50
Adding Ad Hoc Information for a Group of Employees.....	51

Chapter 11

Viewing and Reporting on Total Compensation Data.....	53
Viewing Employee Compensation Data Online.....	53
Page Used to View Total Compensation Output.....	53
Viewing Employee Total Compensation.....	53
Viewing Compensation Data in Excel.....	54
Page Used to View Compensation Data in Excel.....	54
Launching Excel.....	54
Running Total Compensation Reports.....	55
Common Elements Used in This Section.....	55
Pages Used to Run Total Compensation Reports.....	56

Chapter 12

Processing the OLAP Cubes.....	57
Understanding How to Process Cubes.....	57
Setting the Destination Directory.....	57
Building Cubes.....	57
Page Used to Build Cubes.....	58
Building an OLAP Cube.....	58

Glossary of PeopleSoft Terms.....	61
--	-----------

Index	73
--------------------	-----------

About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by 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.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, 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.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft 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 that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</i> , not the letter <i>O</i> .
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.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID 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.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, 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.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access 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).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources: Report Total Compensation Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

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

PeopleSoft Application Fundamentals

The *PeopleSoft 8.8 Human Resources: Report Total Compensation PeopleBook* provides you with implementation and processing information for your PeopleSoft 8.8 Human Resources: Report Total Compensation PeopleBook system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding...	This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.

CHAPTER 1

Getting Started With PeopleSoft Human Resources: Report Total Compensation

This chapter provides an overview of PeopleSoft Human Resources: Report Total Compensation business processes and discusses:

- PeopleSoft Human Resources: Report Total Compensation integrations.
- PeopleSoft Human Resources: Report Total Compensation implementation tasks.

Report Total Compensation Business Processes

PeopleSoft Human Resources: Report Total Compensation consists of the following business processes:

- Report on total compensation.
- Inquire on total compensation.
- Retrieve Human Resources total compensation data.
- Analyze total compensation data.

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

PeopleSoft Human Resources: Report Total Compensation Integrations

PeopleSoft Human Resources integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

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

PeopleSoft Human Resources: Report Total Compensation integrates with the following PeopleSoft HRMS applications: Payroll for North America and Benefits Administration.

We cover integration considerations in this PeopleBook.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Understanding Enterprise Integration Points in HRMS”

PeopleSoft Human Resources: Report Total Compensation Implementation

The Report Total Compensation table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Report Total Compensation application tables.
- Additional Report Total Compensation application tables.

In the planning phases of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

Important! The order in which you set up tables required to implement PeopleSoft Human Resources: Report Total Compensation may vary; each individual application isn’t necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the Report Total Compensation core application, then several tables specific to the country or industry you operate in, followed by additional Report Total Compensation core tables. In addition, the order in which you set up tables may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn’t offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

The Report Total Compensation business process requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the Report Total Compensation business process setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	
2. Set up PeopleSoft Human Resources fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Getting Started With PeopleSoft HRMS”</i>

Setting Up Core PeopleSoft Human Resources: Report Total Compensation Tables

The steps discussed in this section suggest an order in which you define the information in your core Report Total Compensation tables. The information that you defined in your foundation tables lays the foundation for this setup.

Setting up these core tables prepares your system to support these business processes:

- Report on total compensation.

- Inquire on total compensation.
- Retrieve PeopleSoft Human Resources total compensation data and display it in Microsoft Excel.
- Analyze total compensation data in Cognos PowerPlay, an OLAP tool.

Step	Reference
1. Define additional rollup categories for the Compensation Tree.	Chapter 4, “Setting Up the Total Compensation Reporting Structure,” Defining Compensation Sources, page 15
2. Define additional sources of total compensation data.	Chapter 4, “Setting Up the Total Compensation Reporting Structure,” Defining Compensation Sources, page 15
3. Add or modify compensation IDs.	Chapter 4, “Setting Up the Total Compensation Reporting Structure,” Pages Used to Define Compensation IDs, page 20
4. Set up the compensation tree.	Chapter 4, “Setting Up the Total Compensation Reporting Structure,” Setting Up the Compensation Tree, page 25
5. Create, review, or update a reporting plan.	Chapter 6, “Setting Up Total Compensation Reporting Plans,” Defining a Reporting Plan and Associating to a Group ID, page 29
6. Create a total compensation department tree.	Chapter 7, “Setting Up the OLAP Cubes,” Creating the Total Compensation Department Tree, page 36

Setting Up Additional PeopleSoft Human Resources: Report Total Compensation Tables

These steps define information in additional Report Total Compensation tables. The information that you define in your core tables lays the foundation for this Report Total Compensation-specific set up.

Setting up this additional information prepares your system to report by group.

Step	Reference
1. Set up reporting groups.	Chapter 5, “Defining Reporting Groups,” page 27

CHAPTER 2

Understanding Total Compensation Reporting

Use Total Compensation Reporting to track, report, and analyze the collective cost of compensating your employees.

Total Compensation Reporting offers a variety of ways to view and analyze compensation information from PeopleSoft Payroll for North America, PeopleSoft Benefits Administration, and the PeopleSoft Human Resources business processes Base Benefits, Multiple Components of Pay, and Manage Variable Compensation.

Report Total Compensation Business Processes

PeopleSoft Human Resources: Report Total Compensation supports the following business processes:

- Retrieving PeopleSoft Human Resources total compensation data.

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

See [Chapter 9, “Extracting Total Compensation Data,” page 41.](#)

- Reporting on total compensation.

See [Chapter 10, “Including Ad Hoc Information in the Data Warehouse,” page 49.](#)

See [Chapter 11, “Viewing and Reporting on Total Compensation Data,” Running Total Compensation Reports, page 55.](#)

You can create the following reports of total compensation:

- 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.

- Inquiring on total compensation.

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

See [Chapter 11, “Viewing and Reporting on Total Compensation Data,” Viewing Employee Compensation Data Online, page 53.](#)

See [Chapter 11, “Viewing and Reporting on Total Compensation Data,” Viewing Compensation Data in Excel, page 54.](#)

- Analyzing total compensation data.

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

See [Chapter 12, “Processing the OLAP Cubes,” page 57.](#)

PeopleSoft Human Resources: Report Total Compensation Integrations

PeopleSoft Human Resources integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

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

PeopleSoft Human Resources: Report Total Compensation integrates with the following PeopleSoft HRMS applications: Payroll for North America and Benefits Administration.

We cover integration considerations in this PeopleBook.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Enterprise Integration Points in HRMS”

Setting Up Total Compensation Reporting

To use the Total Compensation Reporting business process, you must set up:

- The total compensation reporting structure.

See [Chapter 12, “Processing the OLAP Cubes,” page 57.](#)

The reporting structure includes:

- Rollup categories.
 - Compensation sources.
 - Compensation IDs.
 - Extract data mapping.
- The reporting plans.

See [Chapter 6, “Setting Up Total Compensation Reporting Plans,” page 29.](#)

See Also

[Chapter 1, “Getting Started With PeopleSoft Human Resources: Report Total Compensation,” page 1](#)

CHAPTER 3

Using the Total Compensation Reporting Business Process

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:

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

Understanding the Output of 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:

Total Compensation Reporting employs the following output methods:

- *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*

Retrieves PeopleSoft 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.

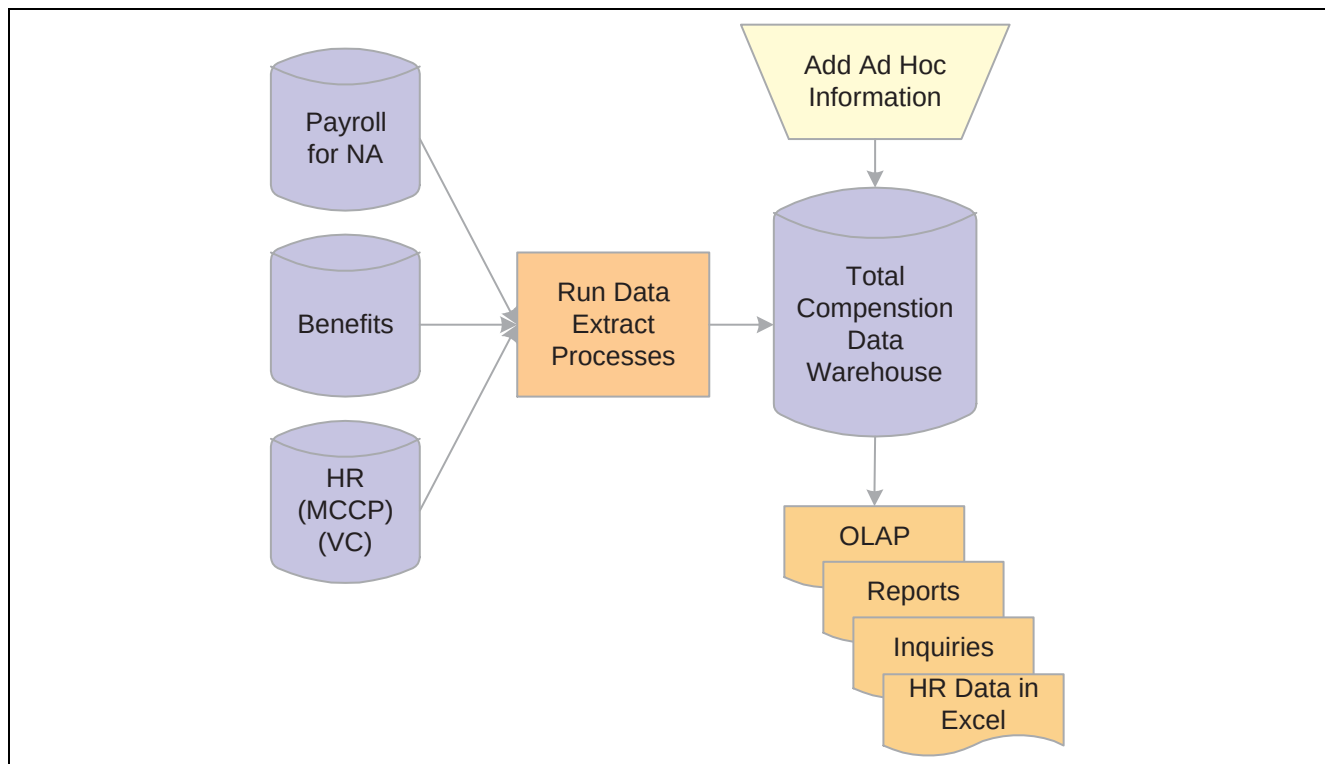
This document assumes you are familiar with OLAP concepts and terminology.

See Also

PeopleTools PeopleBook: Cube Manager

Understanding the Reporting Process

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

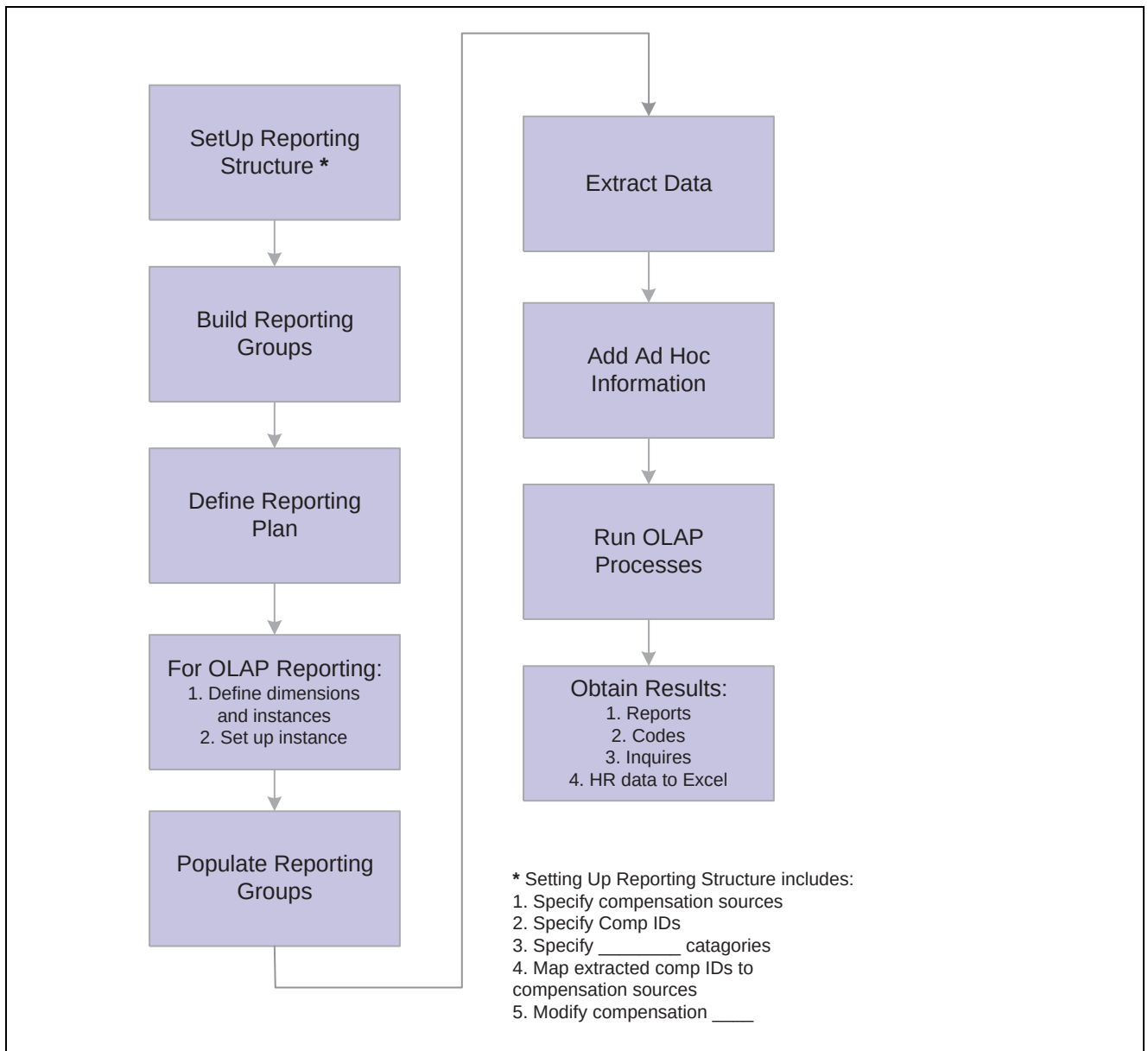


The Report Total Compensation process

Understanding the 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

Understanding the 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 you begin data collection.

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*).

Understanding 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). PeopleSoft 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.

Understanding 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 PeopleSoft Benefits Administration 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 PeopleSoft Human Resources or PeopleSoft Benefits Administration is not aggregated with PeopleSoft Payroll data.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Working With Groups"

CHAPTER 4

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.

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

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).

Understanding 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
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

Category Name	Description	Category Name	Description
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	Compensation, Report Total Compensation, Define Cube Parameters, Rollup 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.

Understanding 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 Source	Source Application	Source Type	Extract Program	Mapping
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
PAYEARN	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
Comp Source page (compensation source page),	TC_COMPSOURCE	Compensation, Report Total Compensation, Define Cube Parameters, 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

Chapter 4, “Setting Up the Total Compensation Reporting Structure,” Adding or Modifying Compensation IDs, page 21

Defining Compensation Sources

Access the Comp Source page.

Comp Source

Comp Source: BASSAL

Description: Base Salary

Source Type: Extract ***Amount Type:** Comp Amt

Extract Program: HR_TCMCOMP ***Map Based On:** MCOP

Comment: This Compensation Source is used to get Base Pay Component From Compensation Record.

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). Use the amount type to qualify the data being extracted or added. This way, you can ensure that there is no double accounting between the compensation amounts extracted from HR and the payroll amounts.

If the Source Type is *Extract* and the Extract Program is one of the payroll extracts, 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*, the 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

Chapter 4, “Setting Up the Total Compensation Reporting Structure,” Understanding PeopleSoft Predefined Compensation Sources, page 15

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

Chapter 4, “Setting Up the Total Compensation Reporting Structure,” Defining Compensation Sources, page 15

Understanding 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

Comp ID	Mapping (Sources)	Comp ID	Mapping (Sources)
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-CREDIT	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

Comp ID	Mapping (Sources)	Comp ID	Mapping (Sources)
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-CREDIT	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	Compensation, Report Total Compensation, Define Cube Parameters, Compensation, Compensation Definition	Add or modify compensation IDs.
Compensation Mapping	TC_COMP_MAP	Compensation, Report Total Compensation, Define Cube Parameters, Compensation, Compensation Mapping	Map new compensation IDs to their compensation sources.

Understanding 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. To access these pages click the Go To Mapping link on the Compensation Mapping page.

Mapping Field Value	Object Name	Compensation Mapping Page Name
Ben/Deduct	TC_MAP_BENEFIT_SEC	Benefits Mapping
CAN Taxes	TC_MAP_TAX_CAN_SEC	Canadian Taxes Mapping

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

Adding or Modifying Compensation IDs

Access the Compensation Definition page.

Compensation Definition

Compensation Mapping

Comp ID: ADHEE

***Description:** Ad-Hoc Award

Compensation Type: Direct **Organizational Cost:** Yes

EE Compensation Total: Yes

Comment: This Compensation Source is used to get Awards from an Ad-Hoc Variable Compensation Plan.

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.

Mapping Benefits and Deductions

Access the Benefits and Deduction Mapping page.

Benefits and Deduction 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 Mapping page.

Earnings Mapping

Earnings Code Mapping

[Customize](#) | [Find](#) | [View All](#) | 

First  1 of 1  Last

Earnings Code	Description		
			 

Earnings 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

Multiple Components Mapping

[Customize](#) | [Find](#) | [View All](#) | 

First  1 of 1  Last

Rate Code	Comp Base Pay Switch	Rate Code Class		
				 

Multiple Components Mapping page

Rate Code Select from the list of translate values.

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

Rate Code Class This appears only when the Rate Code is associated with a rate code class.

See Also

PeopleSoft Human Resources: Administer Compensation

Mapping Variable Compensation

Access the Variable Compensation Mapping page.

Variable Compensation Mapping

Variable Compensation Mapping

[Customize](#) | [Find](#) | [View All](#) | 

First  1 of 1  Last

VC Plan ID	Description		
			 

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.

Taxes Mapping

U.S. Taxes Mapping

Customize | Find | View All |

First ◀ 1 of 1 ▶ Last

Tax Class	Description	Gross-Up		
☐		☐		

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:

SetID: BNUSA **Tree Name:** TOTALCOMP Total Compensation Rollups
Effective Date: 01/01/1900 **Status:** Active **Last Audit:** Valid Tree

[Save As](#) [Tree Definition](#) [Display Options](#) [Print Format](#) [Close](#)

TOTALCOMP > BENEFITS > SAVINGS
[Collapse All](#) | [Expand All](#) [Find](#) First Page ◀ 12 of 38 ▶ Last Page

- TOTALCOMP - TOTAL COMPENSATION
 - BENEFITS - Benefits Compensation Rollup
 - HEALTH - Health benefit plans rollup
 - LIFE -
 - DISABILITY -
 - SAVINGS -
 - LEAVE -
 - [\[BN SIC EA\] - BN SICK LEAVE EMPLOYEE PAID AFTER-TAX](#)
 - [\[BN VAC EA\] - BN VACATION EMPLOYEE PAID AFTER-TAX](#)
 - FSA -
 - [\[BN FSAD EBI\] - BN FSA DEPENDENT CARE EMPLOYEE PAID BEFORE-TAX](#)
 - [\[BN FSAH EBI\] - BN FSA HEALTH CARE EMPLOYEE PAID BEFORE-TAX](#)

Compensation Tree

See Also

PeopleTools PeopleBook: Tree Manager

CHAPTER 5

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, these groups are 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
 - ExecutivesGroup 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 8.8 Application Fundamentals for HRMS PeopleBook, "Working With Groups"

Chapter 6, "Setting Up Total Compensation Reporting Plans," page 29

CHAPTER 6

Setting Up Total Compensation Reporting Plans

This chapter discusses how to:

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

Defining a Reporting Plan and Associating to a Group ID

This section discusses the pages you'll need to set up reporting plans and associate them to a tree and group ID.

Pages Used to Set Up Total Compensation Reporting Plans

Page Name	Object Name	Navigation	Usage
Reporting Plan - Definition	TC_PLAN	Compensation, Report Total Compensation, Define Cube Parameters, Reporting Plan, Definition	Create, review, or update a reporting plan.
Reporting Plan - Total Comp Plan Group	TC_PLAN_GRP	Compensation, Report Total Compensation, Define Cube Parameters, Reporting Plan, Total Comp Plan Group	Associate a tree and group IDs to a reporting plan.

Creating, Reviewing, and Updating a Plan

Access the Reporting Plan - Definition page.

The screenshot shows a software interface for defining a Total Compensation Plan. The 'Definition' tab is active, and the 'Total Comp Plan Group' is 'BENAMS'. The 'Plan Information' section includes fields for 'Effective Date' (01/01/1998), 'Plan Name' (Benefits Test TC), and a 'Comment' box. Below this, 'Period Frequency' is set to 'A' (Annually). 'From Date' is 01/01/1997 and 'Thru Date' is 12/31/1997. The 'Frozen' status is set to 'Yes'. 'Cur Effdt' has options for 'Thru Date' and 'Effdt'. 'Currency Code' is 'USD' and 'Rate Type' is 'OFFIC'. 'Cur Rate Effdt' is 01/01/1998.

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 Effdt (effective date) in the Cur Rate Effdt field.

Rate Type

Select the currency rate type. 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 Efftd 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 - Total Comp Plan Group page.

Definition **Total Comp Plan Group**

Total Comp Plan ID: BENAMS

Plan/Group Details Find | View All First 1 of 1 Last

Effective Date: 01/01/1998 **Tree Name:** TOTALCOMP

Plan Group IDs Customize | Find | View All | First 1-2 of 2 Last

Group ID	Description		
BUTC%	Benefits TComp Emplid TC%	+	-
TC%		+	-

Reporting Plan - Total Comp 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

Chapter 5, "Defining Reporting Groups," page 27

CHAPTER 7

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.

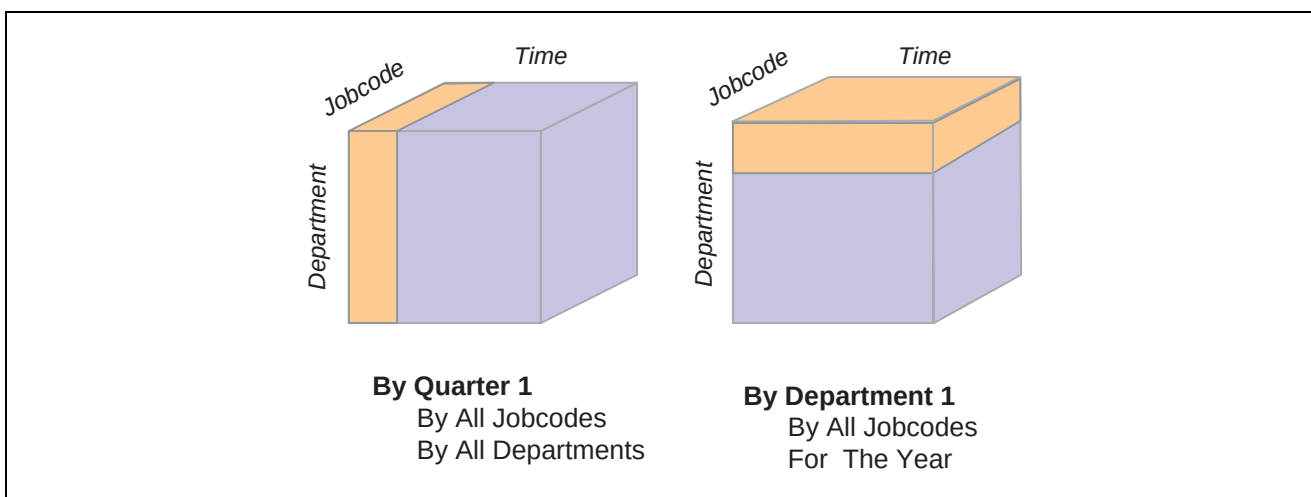
Note. The PeopleTools Cube Manager is designed to be OLAP platform independent and integrate with both Cognos PowerPlay and Arbor Essbase. The Compensation cube and Headcount/FTE cube are designed for use with PowerPlay.

Understanding 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.

Understanding PeopleSoft Predefined Dimensions and Measures

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

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

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_COMPENSATION	Compensation	Tree	You modified this tree when you set up the total compensation reporting structure.

Dimension	In Which Cubes?	Rollup Type	Comments
TC_DEPT	Both	Tree	TC_DEPT trees are copies of standard department trees in which the department IDs are the concatenation of the setID with the standard 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	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.

Dimension	In Which Cubes?	Rollup Type	Comments
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

Chapter 4, "Setting Up the Total Compensation Reporting Structure," page 13

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 page	TC_DEPT_TREE	Compensation, Report Total Compensation, Define Cube Parameters, 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 8

Populating Reporting Groups

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

Populating 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 page	TC_GROUP_RUNCTL	Compensation, Report Total Compensation, Determine Total Compensation, Create Reporting Groups	Populate the reporting groups that you define.

Populating Reporting Groups

Access the Group Population Process page.

Group Population Process

Run Control ID: 01

Report Manager

Process Monitor

Run

Total Comp Plan ID: Total Comp Plan Effdt:

Run Type:

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.



Click to run the Group Population process.

CHAPTER 9

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

[Chapter 4, "Setting Up the Total Compensation Reporting Structure," page 13](#)

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, 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. 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.

Process Name	Compensation Source	Source Application
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	PAYEARN (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.

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.

See Also

PeopleSoft Human Resources PeopleBook: Manage Variable Compensation

PeopleSoft 8.8 Human Resources PeopleBook: Manage Variable Compensation, “Calculating Allocations and Awards,” Determining Allocations for Total Compensation Reporting

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! PeopleSoft 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.

Pages Used to Extract Total Compensation Data

Page Name	Object Name	Navigation	Usage
Ben Dedn Extract (benefits deduction extract)	RUN_CNTL_TOTL_COMP	Compensation, Report Total Compensation, Determine Total Compensation, Calculate Benefits	Run the benefits calculation.
Calculation Process Messages	CALC_MESSAGE	Compensation, Report Total Compensation, Cube Contents, Review Calculation Messages	Display information about any errors that occurred during the benefits calculation process.
Extract	TC_RUN_CNTL_PNL	Compensation, Report Total Compensation, Determine Total Compensation, Extract Payroll/Comp Data	Run the extracts and view the run history.
Plan Inquiry	TC_PLAN_INQ_PNL	Compensation, Report Total Compensation, Cube Contents, Review Status of Extract	View the status of the extracts for a given reporting plan.

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 Administer Compensation 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

Chapter 4, “Setting Up the Total Compensation Reporting Structure,” Mapping Compensation IDs, page 22

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 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

Chapter 6, “Setting Up Total Compensation Reporting Plans,” Creating, Reviewing, and Updating a Plan, page 29

Running the Benefits Calculations

This COBOL process writes to the PS_TOTAL_DED Table.

Access the Ben Dedn Extract page.

Ben Dedn Extract			
Run Control ID: 01		Report Manager Process Monitor Run	
Report Request Parameter(s)			
Total Comp Plan ID:		Q	
Effective Date:		From Date:	Thru Date:
		Tot Comp Freq:	
Restart Information		Restart Position	
Chk Point Interval in Minutes:		Benefit Program:	
		EmplID:	
		Empl Rcd Nbr:	
		Thru Date:	

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.

CHAPTER 10

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

To add 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

Chapter 4, "Setting Up the Total Compensation Reporting Structure," page 13

Pages Used to Add Ad Hoc Awards

Page Name	Object Name	Navigation	Usage
Ad-Hoc Employee	TC_ADHOC_EMPL	Compensations, Report Total Compensation, Determine Total Compensation, Adhoc Comp for Employees	Add ad hoc compensation for a small number of employees.
Adhoc Organization	TC_ADHOC_ORG	Compensations, Report Total Compensation, Determine Total Compensation, Adhoc Comp for 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

Total Comp Plan ID: KBENEF **Effective Date:** 01/01/2000
Compensation ID: HXTHEATER **Compensation Source:** HXTHEATER

General Details Find | View All First 1 of 1 Last

***EmpID:** **Job As Of Date:** 01/01/2000

Employee Info		Job Information		
Rcd#:	0	Jobcode SetID:	Job Code:	Position:
SeqNum:	0	Salary SetID:	Sal Plan:	Grade: Step: 0

Company Information		Date Interval
Business Unit:		☐ Date Override *From Date: 01/01/2000 *Thru Date: 12/31/2000
Company:		
Location SetID:	Location:	
Department SetID:	Department:	
Labor Agreement SetID:	Labor Agreement:	
Category:		

Comp Amt: **Currency:** **Cnw Comp Amt:** USD

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 compensation amount and converted compensation amount

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	
Run Control ID: 01	Report Manager Process Monitor Run
Plan Information	
*Total Comp Plan ID:	*Effective Date:
*Comp Source:	*Compensation ID:
Date Interval	
From Date:	Thru Date:
Organization	
Job As Of Date:	
Group ID:	
Amount	
Amount:	*Currency:

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 11

Viewing and Reporting on Total Compensation Data

This chapter discusses how to:

- View employee compensation data online.
- View compensation data in Excel.
- Generate reports of employee compensation data.

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 8.8 Application Fundamentals for HRMS PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Report Total Compensation Reports

Page Used to View Total Compensation Output

Page Name	Object Name	Navigation	Usage
Employee Total Compensation	TC_EE_COMP	Compensation, Report Total Compensation, Cube Contents, Review Employee Total Comp	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

EmplID: KU0001 Lewis,Douglas

Empl Rcd#: 0

Total Comp Plan ID:

Total Comp Plan Effdt:

From:

Thru Date:

Amount Type:

[Refresh](#)

Compensation Detail

Customize | Find | 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

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 PeopleSoft Benefits Administration or PeopleSoft 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	Compensation, Report Total Compensation, Cube Contents, Transfer Comp 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.

Note. When the Excel file is created, it is created and saved in the Default Log/Output directory on the server. To view this on the client machine, the file needs to be 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.

Running Total Compensation Reports

This section explains how to generate reports of your employees' total compensation.

Common Elements Used in This Section

Amount Type

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

Group ID

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

Pages Used to Run Total Compensation Reports

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

CHAPTER 12

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

[Chapter 7, "Setting Up the OLAP Cubes," page 33](#)

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	Compensation, Report Total Compensation, Determine Total Compensation, Build 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.

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

Index

A

- ad hoc awards 49
- ad hoc data 49
- Ad-Hoc Employee page 50
- additional documentation viii
- Adhoc Organization page 50–51
- ALL_TIME Tree 36
- application fundamentals vii

B

- Ben Dedn Extract page 44, 46
- Benefit Statement page 56
- Benefits and Deduction Mapping page 20, 23
- benefits data 45

C

- Calculation Process Messages page 44
- Canadian Taxes Mapping page 20, 23
- comments, submitting xi
- common elements xi
- Comp Source page 16
- compensation data 43
- Compensation Data to Excel page 54
- Compensation Definition page 20–21
- compensation IDs 10, 18
- Compensation Mapping page 20, 22
- compensation sources
 - defining 15
 - understanding predefined 15
- compensation tree
 - setting up 25
 - understanding 9
- Consolidated Publications Incorporated (CPI) viii
- contact information xi
- country-specific documentation x
- cross-references x
- Cube page 58
- Customer Connection Website viii

D

- data extraction 41
- department tree 36
- Department Tree page 36

- dimensions 34
- documentation
 - country-specific x
 - printed viii
 - related viii
 - updates viii
- double accounting 11

E

- Earnings Code Mapping page 21
- Earnings Mapping page 24
- Employee Compensation Report page 56
- Employee Total Compensation page 53
- Excel
 - launching the Excel page 54
 - viewing compensation data 54
- extract data 18
 - compensation 43
 - payroll 43
- Extract page 44, 47

G

- glossary 61
- Group Compensation page 56
- Group Population Process page 39

I

- integrations 1

M

- mapping compensation 20
- mapping extract data 18
- measures 34
- multiple components 44
- Multiple Components Mapping page 21, 24

N

- notes x

O

- OLAP (Online Analytical Processing) 33
- OLAP cubes
 - processing 57
 - setting the destination directory 57

setting up 33
 OLAP reporting 33

P

payroll data 43
 PeopleBooks
 ordering viii
 PeopleCode, typographical
 conventions ix
 PeopleSoft application fundamentals vii
 Plan Inquiry page 44
 predefined dimensions and measures 34
 prerequisites vii
 printed documentation viii
 process sequence 8

R

related documentation viii
 report total compensation
 creating a department tree 36
 getting started 1
 implementing 2
 integrating 1
 running reports 55
 setting up reporting plans 29
 setting up the report structure 13
 understanding 5
 using the business process 7
 reporting
 setting up the structure 13
 understanding the output 7
 understanding the process 8
 reporting groups
 defining 27
 populating 39
 understanding 27
 Reporting Plan - Definition page 29
 Reporting Plan - Total Comp Plan Group
 page 29, 31
 reporting plans 29
 reports 55
 rollup categories
 defining 13
 understanding predefined 14

S

suggestions, submitting xi

T

tables 2
 TC Category page 15
 terms 61
 time periods 10
 total compensation, *See* report total
 compensation
 total compensation data
 extracting 41
 viewing online 53
 typographical conventions ix

U

U.S. Taxes Mapping page 25

V

variable compensation
 data 44
 process 44
 Variable Compensation Mapping page 24
 visual cues x

W

warnings xi