
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Report Total Compensation

December 2006

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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your PeopleBooks Library. You'll find a variety of useful and timely materials, including updates to the full line of PeopleSoft Enterprise documentation that is delivered on your PeopleBooks CD-ROM.

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system 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 Enterprise 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 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 the W key.
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.
. . . (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 ().

Typographical Convention or Visual Cue	Description
[] (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.

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 Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!*, the note 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.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Human Resources Report Total Compensation Preface

This preface discusses:

- PeopleSoft Products.
- PeopleSoft Enterprise application fundamentals.
- PeopleBook structure.

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

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Report Total Compensation

PeopleSoft Enterprise Application Fundamentals

The *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Report Total Compensation* provides you with implementation and processing information for your PeopleSoft Enterprise Human Resources Report Total Compensation system. Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*. Each PeopleSoft Enterprise product line has its own version of this documentation

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications across the PeopleSoft Enterprise HRMS product line. No matter which PeopleSoft Enterprise 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 Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Enterprise HRMS Application Fundamentals Preface”

PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
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 documentation 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.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. Note. Not all applications have delivered custom navigation pages.
Understanding...	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

Chapters	Description
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.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. Note. Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with Total Compensation

This chapter provides an overview of Total Compensation and discusses:

- Total Compensation business processes.
- Total Compensation integrations.
- Total Compensation implementation.

Total Compensation Overview

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

Total Compensation gathers information from several components of PeopleSoft Enterprise HRMS:

- PeopleSoft Enterprise Payroll for North America.
- PeopleSoft Enterprise Benefits Administration.
- PeopleSoft Enterprise Human Resources (HR).

Total Compensation Business Processes

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

- Report on Total Compensation.
- Inquire on Total Compensation.
- Retrieve Human Resources Total Compensation Data.
- Analyze Total Compensation Data.

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

Total Compensation Business Processes

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

- Retrieving Total Compensation data.

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

- Reporting on total compensation.

See [Chapter 8, “Including Ad Hoc Information in the Data Warehouse,” page 51](#).

See [Chapter 9, “Viewing and Reporting on Total Compensation Data,” Running Total Compensation Reports, page 57](#).

You can create these reports of total compensation:

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

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

See [Chapter 9, “Viewing and Reporting on Total Compensation Data,” Viewing Compensation Data Online, page 55](#).

See [Chapter 9, “Viewing and Reporting on Total Compensation Data,” Viewing Compensation Data in Excel, page 56](#).

- Analyzing total compensation data.

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

See [Chapter 10, “Processing OLAP Cubes,” page 59](#).

Total Compensation Integrations

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

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

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

We cover integration considerations in this PeopleBook.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Getting Started with PeopleSoft Enterprise HRMS”

Total Compensation Implementation

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

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

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

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

Other Sources of Information

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

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Enterprise HRMS Application Fundamentals Preface”

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

CHAPTER 2

Understanding Total Compensation

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

Total Compensation Output

Total Compensation enables you to generate the following output:

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

- *Inquiries*

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

- *Spreadsheet*

Retrieves total compensation data and display it in Microsoft Excel.

- *OLAP Analysis Models (Cubes)*

PeopleSoft Enterprise HRMS integrates with Cognos PowerPlay, an online analytical processing (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.

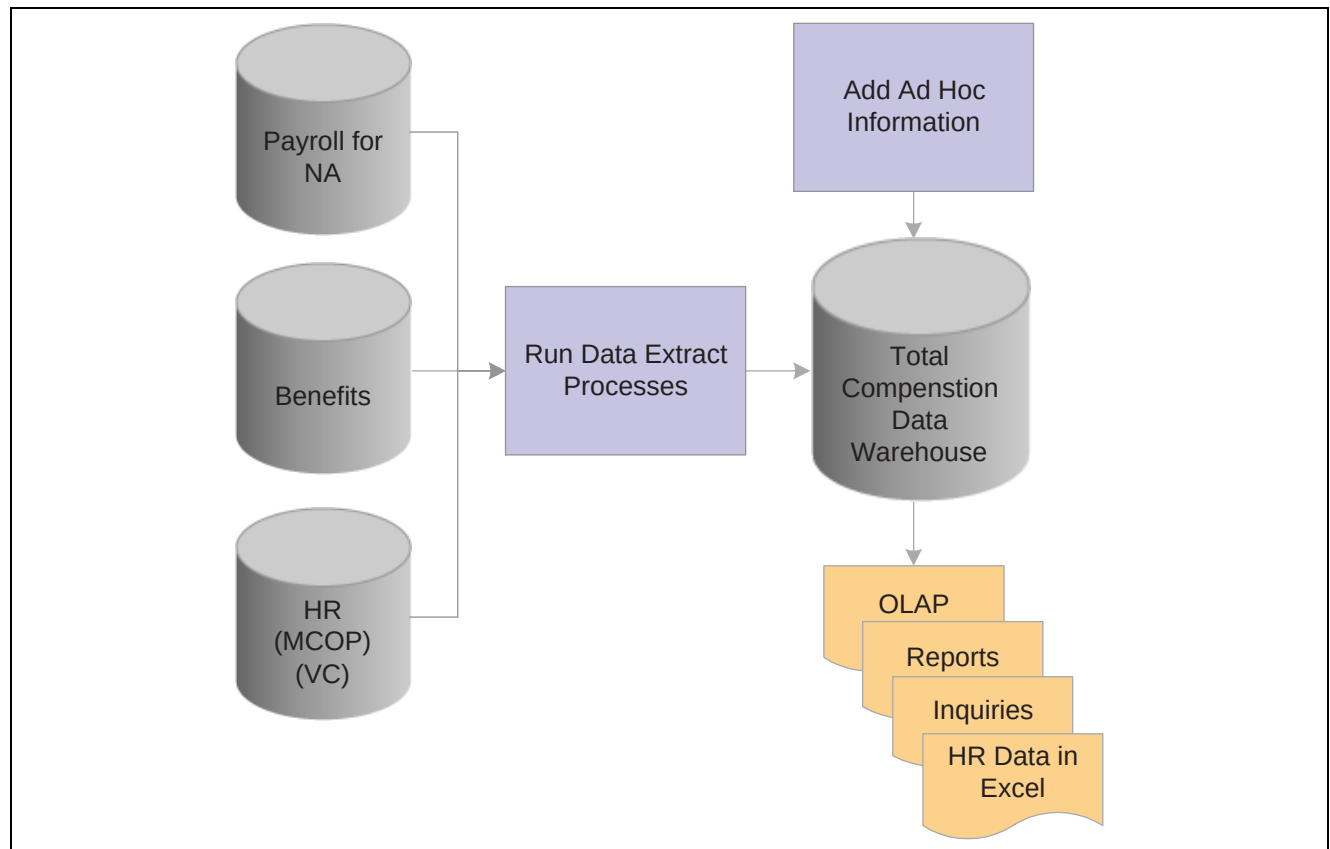
This document assumes you are familiar with OLAP concepts and terminology.

See Also

Enterprise PeopleTools PeopleBook: Cube Manager

Total Compensation Process

This illustration provides an overview of the Total Compensation process:

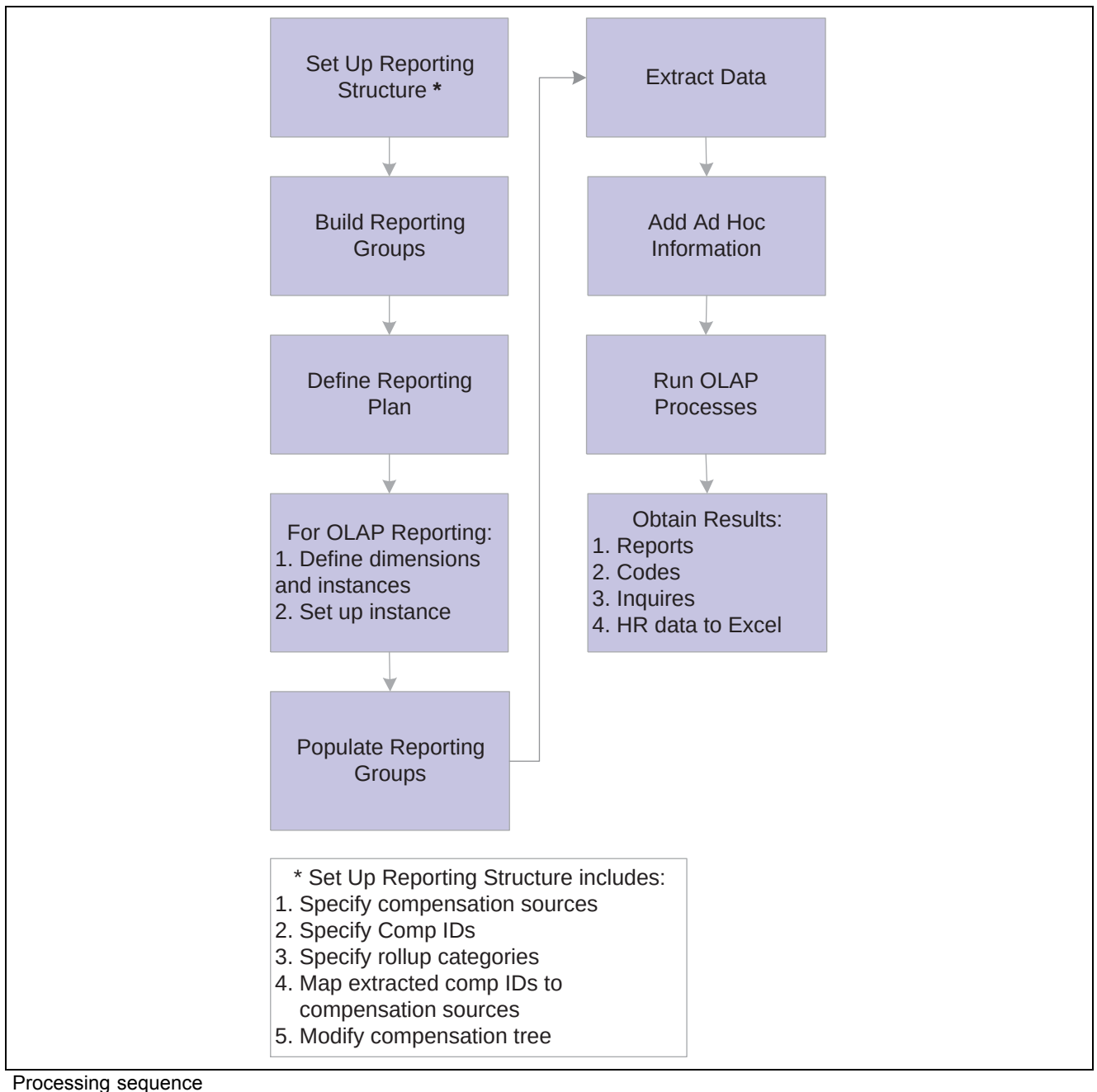


Total Compensation process

Processing Sequence

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

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



Compensation Trees

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

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

TOTALCOMP	tree name
01/01/1900	
CATEGORY 1	<i>node</i>
COMPID 1	<i>leaf</i>
COMPID 2	<i>leaf</i>
CATEGORY 2	<i>node</i>
COMPID 3	<i>leaf</i>
CATEGORY 3	<i>node</i>
COMPID 4	<i>leaf</i>
COMPID 5	<i>leaf</i>

Compensation Tree structure

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

Compensation IDs and Their Sources

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

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

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

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

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

Time Periods

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

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

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

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

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

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

Preventing Double Accounting

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

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

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

- Compensation amounts are extracted from the Human Resources and Benefits Administration applications.

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

See Also

Chapter 4, "Setting Up Reporting Groups," page 29

CHAPTER 3

Setting Up the Total Compensation Reporting Structure

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

- Define rollup categories.
- Define compensation sources.
- Define compensation IDs (comp IDs) and map extract data.
- Map benefits and deductions.
- Map taxes.
- Map earnings codes.
- Map multiple components.
- Map variable compensation.
- Set up the Compensation Tree.

Understanding Tools

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

- Cube Manager
- Tree Manager
- Group Build

Note. Cube Manager integrates with two third-party online analytical processing (OLAP) tools, Arbor Essbase and Cognos PowerPlay.

See Also

Enterprise PeopleTools PeopleBook: Cube Manager

Enterprise PeopleTools PeopleBook: Tree Manager

Defining Rollup Categories

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

This section provides an overview of the predefined rollup categories and discusses how to define rollup categories.

Understanding the Predefined Rollup Categories

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

You define rollup categories by defining:

1. The nodes and leaves of the Compensation Tree.
2. The Compensation Tree itself.

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

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

Category Name	Description	Category Name	Description
ADD	ADD Plan	KAISER	Kaiser Medical
ALLOWANCES	Employee Allowances	LEAVE	Leave Plan
BAS-LIFE	Basic Life	LIFE	Life Insurance
BASEPAY	Base Pay Earnings 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

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

Page Used to Define Rollup Categories

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

Defining Compensation Sources

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

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

Understanding Predefined Compensation Sources

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

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

You define compensation sources by:

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

2. Adding and modifying the compensation IDs.

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

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

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

Page Used to Define Compensation Sources

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

See Also

Chapter 3, “Setting Up the Total Compensation Reporting Structure,” Adding and Modifying Compensation IDs, page 20

Defining Compensation Sources

Access the Comp Source page.

Comp Source page

Source Type

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

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

Amount Type

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

If the source type is *Extract* and the extract program is one of the payroll extracts, the Amount Type field is unavailable and is set to *Payroll Amt*.

If the source type is *Extract* and the extract program is one of the benefit extracts, the Amount Type field is unavailable and is set to *Comp Amt*.

If the source type is *Ad-Hoc Org* or *Ad-Hoc Emp*, the Extract Program field is unavailable.

Extract Program

This is normally unavailable for selection. Ad hoc entries don't need extractions.

If you select *Extract* as the source type, the Extract Program field is available. You have already defined the extract program name for each predefined compensation source. This is the name of the Application Engine extract

process that extracts data from the HRMS system and puts it in the data warehouse.

Map Based On

If you entered a source type of *Ad Hoc Emp* or *Ad Hoc Org*, then indicate *No Mapping*.

See [Chapter 3, “Setting Up the Total Compensation Reporting Structure,” Understanding Predefined Compensation Sources, page 13.](#)

See Also

[Chapter 3, “Setting Up the Total Compensation Reporting Structure,” Understanding Compensation IDs, page 16](#)

Defining Compensation IDs and Mapping Extract Data

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

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

- Add and modify compensation IDs.
- Map compensation IDs.

Understanding Compensation IDs

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

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

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

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

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

See [Chapter 3, “Setting Up the Total Compensation Reporting Structure,” Defining Compensation Sources, page 13.](#)

Predefined Compensation IDs

This table lists the predefined comp IDs and their mapping.

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

Comp ID	Mapping (Sources)	Comp ID	Mapping (Sources)
LTD-CR	Benefits and Deductions	BASE_HR	Multiple Components
LTD-EE	Benefits and Deductions	BASE_PCT	Multiple Components
LTD-ER	Benefits and Deductions	BASE_PTS	Multiple Components
MED-BCB-CR	Benefits and Deductions	NON_BS_FLT	Multiple Components
MED-BCB-EE	Benefits and Deductions	NON_BS_HR	Multiple Components
MED-BCB-ER	Benefits and Deductions	NON_BS_PCT	Multiple Components
MED-KS-CR	Benefits and Deductions	NON_BS_PTS	Multiple Components
MED-KS-EE	Benefits and Deductions	BASEPAY	No Mapping
MED-KS-ER	Benefits and Deductions	ER_PAID_TX	Taxes - United States
PROG-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	None	None

Understanding Compensation Mapping

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

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

Pages Used to Define Compensation IDs

Page Name	Object Name	Navigation	Usage
Compensation Definition	TC_COMP_DEFN	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Definition	Add or modify compensation IDs.
Compensation Mapping	TC_COMP_MAP	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping	Map new comp IDs to their compensation sources.
Benefits and Deduction Mapping	TC_MAP_BENEFIT_SEC	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping Select <i>Ben/Deduct</i> in the Mapping field, and then click Go to Mapping.	Map new compensation IDs to benefits and other deductions.

Page Name	Object Name	Navigation	Usage
Canadian Taxes Mapping , U.S. Taxes Mapping	TC_MAP_TAX_CAN_SEC, TC_MAP_TAX_SEC	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping Select <i>CAN Taxes</i> or <i>USA Taxes</i> in the Mapping field, and then click Go to Mapping.	Map new compensation IDs to Canadian or USA taxes.
Earnings Mapping	TC_MAP_EARN_SEC	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping Select <i>Earnings</i> in the Mapping field, and then click Go to Mapping.	Map new compensation IDs to earnings.
Multiple Components Mapping	TC_MAP_MCOMP_SEC	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping Select <i>MCOP</i> in the Mapping field, and then click Go to Mapping.	Map new compensation IDs to multiple components.
Variable Compensation Mapping	TC_MAP_VCOMP_SEC	Set Up HRMS, Product Related, Compensation, Total Compensation, Compensation ID, Compensation Mapping Select <i>Var Comp</i> in the Mapping field, and then click Go to Mapping.	Map compensation IDs to variable compensation plans.

Adding and 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 values.

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

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

Organizational Cost

Specify whether this type is employer paid or worker paid. This ensures that the costs are not counted twice on the Employee Benefits statement.

Select *Yes* when the cost is employer paid. Select *No* when the cost is worker paid. When you select *No*, the system does not total organizational costs.

EE Compensation Total (employee compensation total)

Select *Yes* or *No* to indicate whether the system should include the comp ID value in calculating the employee compensation total.

Selecting *Yes* indicates that the comp ID is considered part of the worker's total compensation. Selecting *No* indicates that the comp ID is not part of the worker's total compensation, but it is still a cost that you want to track.

Mapping Compensation IDs

Access the Compensation Mapping page.

Compensation Definition Compensation Mapping

Comp ID: ADHEE

Mapping Find | View All First 1 of 1 Last

*Mapping: Var Comp Go To Mapping + -

Compensation Source Detail Customize | Find | View All First 1 of 1 Last

	*Comp Source	Description	Amount Type
1	🔍		+ -

Compensation Mapping page

Mapping

Select a value: *Ben/Deduct, CAN Taxes, Earnings, MCOP, No Mapping, USA Taxes, Var Comp.*

The value that you select determines which extract program retrieves the specified comp ID. For example, you cannot specify earnings and expect benefits data in the results.

For an ad hoc comp ID, select *No Mapping*.

Comp Source
(compensation source)

Select from the translation list. The available values are based on the value that you select in the Mapping field.

Amount Type

The available values are limited based on the value that you select in the Comp Source field.

Go To Mapping

Click this link to access pages where you can view or modify details pertaining to the results returned by the extract program. The available pages depend on the value that you select in the Mapping field.

Mapping Benefits and Deductions

Access the Benefits and Deduction Mapping page.

Benefits and Deduction Mapping

Benefits Mapping								Customize Find View All 		First	1 of 1	Last
Plan Type	Benefit Plan	Deduction Classification	Sales Tax Type	Deduction Code	Description	Cost Type						

OK Cancel

Benefits and Deduction Mapping page

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

(CAN) Mapping Taxes

Access the Canadian Taxes Mapping page.

Taxes Mapping

Canadian Taxes Mapping				Customize Find View All 		First	1 of 1	Last
Canadian Tax Class	Description							
CBT	Canadian Bonus Tax							

OK Cancel

Canadian Taxes Mapping page

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

(USA) Mapping Taxes

Access the U.S. Taxes Mapping page.

Taxes Mapping

U.S. Taxes Mapping			
		Customize	Find
		View All	
		First	Last
1 of 1			
Tax Class	Description		
C	Earned Income Credit	+	-

OK Cancel

U.S. Taxes Mapping page

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

Mapping Earnings Codes

Access the Earnings Mapping page.

Earnings Mapping

Earnings Code Mapping			
		Customize	Find
		View All	
		First	Last
1 of 1			
Earnings Code	Description		
001	Regular	+	-

OK Cancel

Earnings Mapping page

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

Mapping Multiple Components

Access the Multiple Components Mapping page.

Multiple Components Mapping

Multiple Components Mapping				Customize	Find	View All	First	1 of 1	Last
Rate Code	Comp Base Pay Switch	Rate Code Class							
G1CR8	☒								

OK Cancel

Multiple Components Mapping page

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

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Enterprise HRMS Application Fundamentals Preface”

Mapping Variable Compensation

Access the Variable Compensation Mapping page.

Variable Compensation Mapping

Variable Compensation Mapping				Customize	Find	View All	First	1 of 1	Last
Variable Compensation Plan ID	Description								
HVADDISC	Adhoc Award								

OK Cancel

Variable Compensation Mapping page

Variable Compensation Plan ID

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

Setting Up the Compensation Tree

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

This screenshot shows the predefined Compensation Tree:

Tree Manager

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

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

[TOTALCOMP](#) > [BENEFITS](#) > [FSA](#)

[Collapse All](#) | [Expand All](#) [Find](#) First Page 17 of 38 Last Page

- TOTALCOMP - TOTAL COMPENSATION
 - BENEFITS - Benefits Compensation Rollup
 - HEALTH - Health benefit plans rollup
 - LIFE -
 - DISABILITY -
 - SAVINGS -
 - [BN_401_EA] - BN 401K EMPLOYEE CONTRIBUTION AFTER-TAX
 - [BN_401_EB] - BN 401 EMPLOYEE CONTRIBUTION BEFORE-TAX
 - [BN_401_RN] - BN 401 EMPLOYER PAID CONTRIBUTION NONTAXABLE
 - [BN_401_RP] - BN 401 EMPLOYER PAID CONTRIBUTION PRETAX
 - [BN_401_RT] - BN 401 EMPLOYER PAID CONTRIBUTION TAXABLE
 - LEAVE -
 - [BN_SIC_EA] - BN SICK LEAVE EMPLOYEE PAID AFTER-TAX
 - [BN_VAC_EA] - BN VACATION EMPLOYEE PAID AFTER-TAX
 - FSA -
 - [BN_FSAD_EB] - BN FSA DEPENDENT CARE EMPLOYEE PAID BEFORE-TAX
 - [BN_FSAH_EB] - BN FSA HEALTH CARE EMPLOYEE PAID BEFORE-TAX

Total Compensation Tree

See Also

Enterprise PeopleTools PeopleBook: Tree Manager

CHAPTER 4

Setting Up Reporting Groups

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

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

Understanding Reporting Groups

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

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

- Industry A
 - Executives Group 1.
 - Sales Group 2.
 - Non-exempt Group 3.
- Industry B
 - Executives Group 4.
 - Sales Group 5.
 - Non-exempt Group 6.

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

Cognos loads this file 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.

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

You use this procedure to build a reporting group:

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

See Also

[Chapter 5, “Setting Up Total Compensation Reporting Plans,” page 33](#)

Populating Reporting Groups

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

This section discusses how to populate reporting groups.

Page Used to Populate Reporting Groups

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

Populating Reporting Groups

Access the Group Population Process page.

Group Population Process page

Total Comp Plan ID (total compensation plan ID) Select from the options.

Total Comp Plan Effdt (total compensation plan effective date) Select from the options.

Run Type Select the type of run:

Standard populates the TC_POPULATION table with all the workers from all the groups associated with the specified TC Plan ID. If you are rerunning this process, a standard run deletes all previous information and enters new data into the table.

Delete deletes all the group records.



Click to run the Group Population process.

CHAPTER 5

Setting Up Total Compensation Reporting Plans

This chapter discusses how to:

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

Defining a Reporting Plan and Associating It with a Group ID

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

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

Pages Used to Set Up Total Compensation Reporting Plans

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

Creating, Reviewing, and Updating a Plan

Access the Total Comp Reporting Plan - Definition page.

Definition | **Total Comp Plan Group**

Total Comp Plan ID: BNTC_A

Plan Information Find | View All First 1 of 1 Last

*Effective Date: 12/31/1997

*Plan Name: 1997 Annual TC

Comment:

Period Frequency: A

*From Date: 01/01/1997

*Thru Date: 12/31/1997

Frozen

☐ Yes

☒ No

Cur Effdt

☐ Thru Date

☒ Effdt

Currency Code: USD

Rate Type: OFFIC

Cur Rate Effdt: 01/01/1997

Total Comp Reporting Plan - Definition page

Period Frequency

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

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

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 a number greater than 28.

Frozen

The status of the reporting plan.

Selecting *No* means the plan is not frozen.

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

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

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 the same rate type that you specify throughout the HRMS application.

Cur Rate Effdt (currency rate effective date)

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

you enter here—or closest to but less than the *Thru Date* of the plan, if the Thru Date option is selected.

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

Associating Trees and Group IDs with a Plan

Access the Total Comp Reporting Plan - Total Comp Plan Group page.

Definition Total Comp Plan Group

Total Comp Plan ID: BNTC_A

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

Effective Date: 12/31/1997 Tree Name: TOTALCOMP

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

Group ID	Description
BNTC	TC Benefits Calculation

Total Comp Reporting Plan - Total Comp Plan Group page

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

Group ID Select groups from the list.
Add groups as needed for this plan. Ensure that an individual is not in more than one group.

See Also

Chapter 4, “Setting Up Reporting Groups,” page 29

CHAPTER 6

Setting Up the OLAP Cubes

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

- Create the Total Compensation Department Tree.
- Fill in the ALL_TIME Tree.

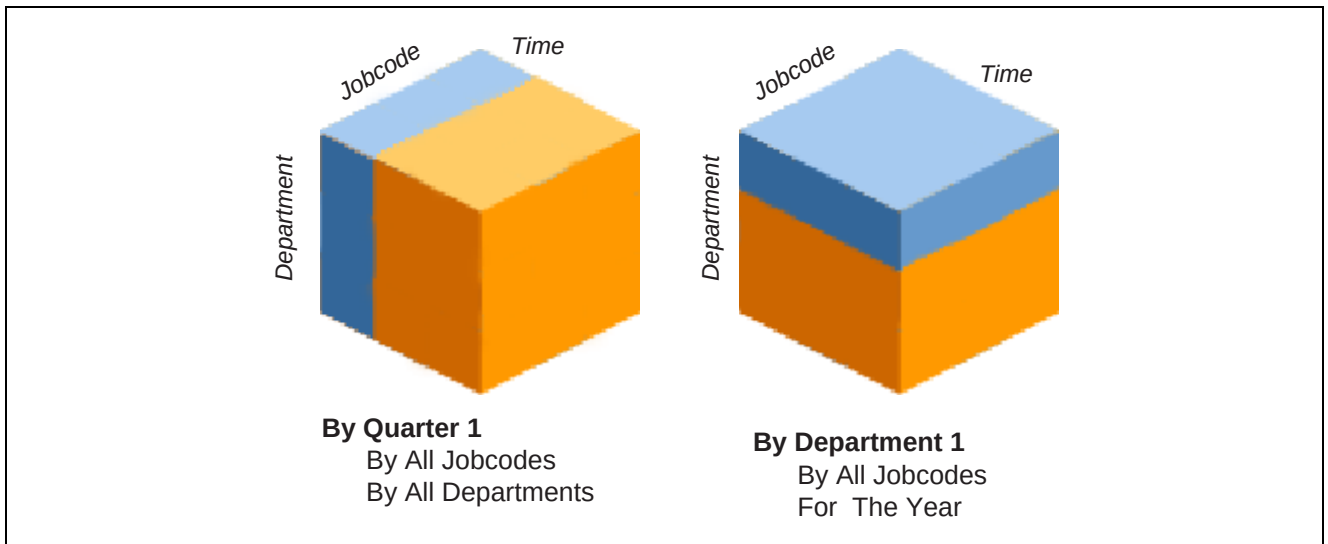
Note. The PeopleTools Cube Manager is designed to be OLAP platform independent and to integrate with both Cognos PowerPlay and Arbor Essbase. The Compensation cube and Headcount/FTE cube are designed for use with PowerPlay.

Understanding OLAP Reporting

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

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

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



Example cubes showing dimensions

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

Understanding PeopleSoft Predefined Dimensions and Measures

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

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

This table lists the total compensation dimensions provided with 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 workers labor agreement and categorization information.
TC_COMPANY	Both	Query	Grouped by country and company code. You usually won't alter the query.
TC_COMPENSATION	Compensation	Tree	You modified this tree when you set up the total compensation reporting structure.

Dimension	In Which Cubes?	Rollup Type	Comments
TC_DEPT	Both	Tree	TC_DEPT trees are copies of standard department trees in which the department IDs are the concatenation of the setID with the standard department ID. For instance, Department 10001 on the US Department Tree is Department USA10001 in the related TC Department Tree.
TC_EE_COMPTOTAL	Compensation	Query	Determines whether you have specified that the comp ID is included in the compensation total. You specify this in the 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 you have specified that the comp ID is worker paid or employer paid. You specify this in the Organizational Cost field on the Compensation Definition page.

See Also

Chapter 3, “Setting Up the Total Compensation Reporting Structure,” page 11

Creating the Total Compensation Department Tree

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

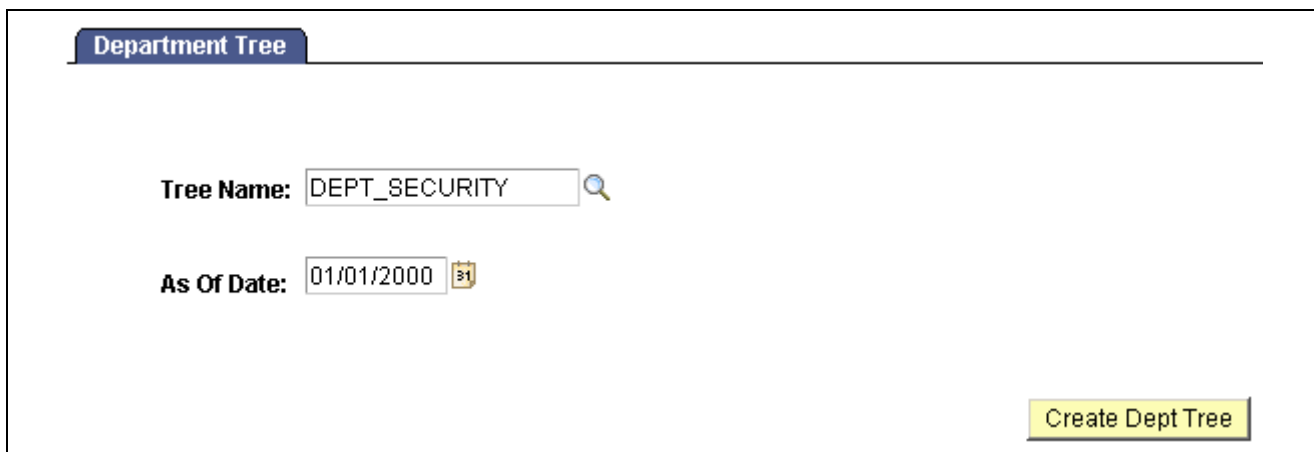
This section discusses how to create a department tree.

Page Used to Create a Department Tree

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

Creating a Department Tree

Access the Department Tree page.



Department Tree

Tree Name: DEPT_SECURITY

As Of Date: 01/01/2000

Create Dept Tree

Department Tree page

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.

Filling in the ALL_TIME Tree

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

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

See Also

Enterprise PeopleTools PeopleBook: Tree Manager

Enterprise PeopleTools PeopleBook: Cube Manager

CHAPTER 7

Extracting Total Compensation Data

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

- Extract payroll data
- Extract compensation data

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

See Also

Chapter 3, “Setting Up the Total Compensation Reporting Structure,” page 11

Understanding Data Extraction

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

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

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

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

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

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

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

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

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

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

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

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Variable Compensation, “Calculating Allocations and Awards,” Determining Allocations

Understanding Multiple Components of Pay

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

1. Retrieves the run control data.
2. Retrieves the period frequency data.
3. Verifies that the associated groups are populated.
4. Retrieves the Administer Compensation data.
5. Populates the data warehouse for each worker in the groups, using the mapping between the compensation rate codes and comp IDs (the mapping is defined on the Compensation Mapping page).

See Also

Chapter 3, “Setting Up the Total Compensation Reporting Structure,” Mapping Compensation IDs, page 21

Understanding Variable Compensation

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

Variable Compensation performs these functions:

1. Retrieves the run control data.
2. Retrieves the period frequency data.
3. Verifies that the associated groups are populated.
4. Retrieves the awards from the Variable Compensation plan, and writes them in the TC_EE_DETAIL table.
5. Calls the Determine Allocations process to calculate target awards for future time periods and updates the TC_EE_DETAIL table (optional).
6. Populates the data warehouse TC_EE_DETAIL table for each worker in the group, using the mapping between the Variable Compensation Plan awards and compensation IDs (the mapping is defined on the Compensation Mapping page).

Extracting Payroll Data

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

- TCPYERN: Extracts payroll actual earnings.
- TCPYDED: Extracts payroll actual deductions withheld.
- TCPYTAX: Extracts payroll actual taxes withheld.

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

Extracting Compensation Data

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

This section discusses how to:

- Extract benefits data.
- Run the benefits calculations.
- Run extracts.

Pages Used to Extract Total Compensation Data

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

Extracting Benefits Data

To extract benefits data using the benefits process:

1. Run the benefits calculation process (the COBOL process PSPTCRUN).
View the error messages on the Calculation Process Messages page.
2. Run the benefits extract (the Application Engine process HR_TCBENEF).

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

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

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

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

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

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

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

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

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

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

- If the contribution is based on a percentage, the deduction is taken for every check for the benefit record.
- If the contribution is based on a flat amount, the deduction is taken when the primary job is paid.

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

The benefits calculation process writes to the PS_TOTAL_DED table.

The Application Engine process writes data to the TC_EE_DETAIL table.

See Also

[Chapter 5, “Setting Up Total Compensation Reporting Plans,” Creating, Reviewing, and Updating a Plan, page 33](#)

Running Benefits Calculations

Access the Ben Dedn Extract page.

Ben Dedn Extract			
Run Control ID: PS	Report Manager	Process Monitor	Run
Report Request Parameter(s)			
Total Comp Plan ID:	BENAMS	Benefits Test TC	
Effective Date:	01/01/1998	From Date:	01/01/1997 Thru Date: 12/31/1997
		Tot Comp Freq:	Annually
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
(total compensation plan identification)

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

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

Enter the restart information in minutes.

Running Extracts

Access the Extract page.

Extract

Run Control ID: 1
[Report Manager](#)
[Process Monitor](#)

Run

*Total Comp Plan ID: BENAMS

*Effective Date: 01/01/1998

*From Date: 01/01/1997

*Thru Date: 12/31/1997

*Run Type: Standard

☐ Calculate Target Award

Prior Plan Runs

Customize | Find | View All |

First 1 of 1 Last

Program	Run Date and Time	From	Thru Date	Program Status

Extract page

Run Type

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

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

Select *Delete* to rerun a process. This purges the data in the TC_EE_Detail table. After the reporting plan status is unfrozen, the plan dates and groups are available for modification. Select *Standard* to retrieve the information.

Calculate Target Award

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

If you 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 you select this check box, targeted awards for Q3 and Q4 are calculated and included.

Prior Plan Runs

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

CHAPTER 8

Including Ad Hoc Information in the Data Warehouse

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

Understanding Ad Hoc Information

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

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

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

Adding an Ad Hoc Award

To add an ad hoc award:

1. Set up a compensation source on the Compensation Source Page.
Set the Source Type field to *Ad Hoc Emp* or *Ad Hoc Org*. Leave the extract program blank. Set the Map Based On field to *No Mapping*.
2. Set up a compensation ID for the award.
Use the Compensation Definition Page.
3. Insert the new compensation ID into the Total Compensation Tree.
Use PeopleSoft Tree Manager.
4. Add the ad hoc information on either the Ad Hoc Employee page or the Ad Hoc Organization Process page.
After you save the page, the information is added to the data warehouse.
5. Continue viewing compensation data, processing OLAP cubes, or running reports.

See Also

Chapter 3, “Setting Up the Total Compensation Reporting Structure,” page 11

Pages Used to Add Ad Hoc Awards

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

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
Company:		*From Date: 01/01/2000
Location SetID:	Location:	*Thru Date: 12/31/2000
Department SetID:	Department:	
Labor Agreement SetID:	Labor Agreement:	
Category:		

Comp Amt: Currency: Cnv Comp Amt: USD

Ad-Hoc Employee page

Job As Of Date

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

Date Interval

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

**Comp Amt and Currency
and Cnv Comp Amt**

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

Adding Ad Hoc Information for a Group of Employees

Access the Adhoc Organization page.

Adhoc Organization			
Run Control ID: aa		Report Manager Process Monitor	Run
Plan Information			
*Total Comp Plan ID:	BENAMS	*Effective Date:	01/01/1998
*Comp Source:	HXSPORTS	*Compensation ID:	HXSPORTS
Date Interval			
From Date:	01/01/1997	Thru Date:	12/31/1997
Organization			
Job As Of Date:	12/31/1997	TC Benefits Calculation	
Group ID:	BNTC		
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 and the Group ID of the award.

Amount

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

CHAPTER 9

Viewing and Reporting on Total Compensation Data

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

- View compensation data online.
- View compensation data in Excel.
- Run total compensation reports.

Understanding the Viewing Options

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

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

Viewing Compensation Data Online

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

This section discusses how to view worker total compensation.

Page Used to View Total Compensation

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

Viewing Employee Total Compensation

Access the Review Employee Total Comp page.

Review Employee Total Comp

EmplID: KU0001 Douglas Lewis

Empl Rcd#: 0

Total Comp Plan ID: KFTCPPLAN

Total Comp Plan Effdt:

From:

Thru Date:

Amount Type: Compensation Amount

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	

Review Employee Total Comp page

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

Viewing Compensation Data in Excel

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

This section discusses how to view compensation data in Excel.

Page Used to View Compensation Data in Excel

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

Launching Excel

Access the Review Total Compensation page.

Review Total Compensation

From Date: 31

Thru Date: 31

Currency Code:

Rate Type:

Cur Effdt: 31

Population

☒ Employee(s)
 ☐ Group(s)

Employee(s)

Customize | Find | View All |

First 1 of 1 Last

EmplID	Name

Refresh

	EmplID	Empl Rcd Nbr	Compensation Eff Sequence	Comp Rate Code	Plan ID	Payout Period ID
1						

Review Total Compensation 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 worker's name appears.

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



(Download)

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

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

Common Elements Used in This Section

Amount Type

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

Group ID

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

Pages Used to Run Total Compensation Reports

Page Name	Object Name	Navigation	Usage
Benefit Statement	TC_BEN_RUN_CNTL	Compensation, Total Compensation, View Total Compensation, Total Comp Statement Report	Run the Total Compensation Statement (Benefits Statement) report (TC001) that provides a listing of all compensation for each individual, designed for distribution to workers.
Group Compensation or Employee Compensation Report	TC_GRP_RUN_CNTL	• Compensation, Total Compensation, View Total Compensation, Group Detail Compensation Rpt • Compensation, Total Compensation, View Total Compensation, 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 workers and define three compensation IDs, the Group Compensation report gives three values, one for each compensation ID. The values are summed for the group. • 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 worker.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports”

CHAPTER 10

Processing OLAP Cubes

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

- Set the destination directory.
- Build cubes.

Understanding How to Process Cubes

To process cubes:

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

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

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

See Also

Chapter 6, “Setting Up the OLAP Cubes,” page 37

Setting the Destination Directory

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

Building Cubes

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

This section discusses how to build a cube.

Page Used to Build Cubes

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

Building a Cube

Access the Cube page.

Cube

Run Control ID: 1
[Report Manager](#)
[Process Monitor](#)

Run

*Cube Instance ID: TC_COMPENSATION

Total Comp Plan ID: KFTCPPLAN
As of Date: 01/01/2002

Time Rollup Attribute: Last Period

Drill Though Cube: C:\TOOLS\APPSERV\CP890DVL\FILES\TC_HEAD

Post-Build Script: C:\Tools\appserv\CP890DVL\files\TC_COMP_P.M

Cube page

Cube Instance ID

Select the cube that you want to process.

Total Comp Plan ID (total compensation plan identification)

Select a total compensation plan ID.

As of Date

Enter the plan's effective date.

Time Rollup Attribute

Select *Average*, *Last Period*, or *First Period*. These values indicate how values are rolled up along the time dimension. For example, in order for full-time equivalent (FTE) values for four quarters to be averaged in a time rollup for an entire year, choose *Average*. For the last quarter value to be rolled up to represent the entire year, choose *Last Period*.

Drill Through Cube

Enter the path for the Cognos .mdc file generated by the process. Cognos uses this file to read all dimensions and measures. A default path appears, based on the information provided in your PeopleTools installation. Headcount appears by default if you are building the Compensation cube, while compensation appears if you are building the Headcount cube.

The path and file names appear by default from the log/output directory you used when you chose which cube to create. You can change the directory and filename. This enables you to drill from the Compensation cube to the Headcount cube and vice versa. If you are creating the Compensation cube and the Headcount cube exists on the server in c:\temp\TC_HEADCOUNT.MDC,

that should be the path and filename used. If the Headcount cube does not exist, you cannot drill through to it. Likewise, if you create the Headcount cube, the drill-through cube should be the Compensation cube.

Post-Build Script

Enter the path for the Cognos .mdl file generated by the process. Cognos uses this file for currency conversion. A default path appears, based on the information provided in your PeopleTools installation. The path and filename appear by default at the log\output directory when the cube is chosen. For the Compensation cube, the filename must be TC_COMP_PMDL. For the Headcount cube, the filename must be TC_HD_PMDL. This is a required field.

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

Glossary of PeopleSoft Enterprise 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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
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 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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
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 Enterprise 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.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
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 activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise 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).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i>.
business unit constraints	In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
buy event	In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction. For bidders, the sale of goods or services.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
cash drawer	A repository for monies and payments taken locally.
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. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise 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.
checkbook	In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
claimback	In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
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> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
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.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .

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, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
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.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. 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.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
constraint	A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.
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 PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

	3C access groups so that you can assign data-entry or view-only privileges across functions.
	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.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
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.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i> .
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
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.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
direct receipt	Items shipped from a warehouse or vendor to another warehouse.
direct ship	Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i>).
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are 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 Enterprise 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 Enterprise 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 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.

elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event constraints	In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.
event propagation process	In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft Enterprise 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.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
financial sanctions	For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment. For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund	In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
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.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GDS	Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
global constraints	In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
ideal response	In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.
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, and user interaction objects.

incentive rule	In PeopleSoft Enterprise 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.
incur	In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
itinerary	In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
KVI	Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.
landlord	In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
lease	In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.
lease abstract	In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.
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.
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.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise 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.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
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.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

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	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
NDP	Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
Optimization Engine	A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.
pagelet	Each block of content on the home page 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 Enterprise and non-PeopleSoft Enterprise content.
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>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (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.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
phase	A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.
pickup quantity	The product quantity that the customer is taking with them from the counter sales environment.
plan	In PeopleSoft Enterprise 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 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.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise 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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
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 a Structured Query Report (SQR), a COBOL or Application Engine 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	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product adds	The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i>).
product bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
proxy bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
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 Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise 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> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
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.
regional sourcing	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
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.
remote data source data	Data that is extracted from a separate database and migrated into the local database.

REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reservations	In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
RFI event	In PeopleSoft Strategic Sourcing, a request for information.
RFx event	In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.
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.
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.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
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.
saved bid	In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.
score	In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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.
sell event	In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. 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.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
short-term customer	A customer not in the system who is entered during sales order entry using a template.

single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise 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.
sourcing objective	For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).
speed key	See <i>communication key</i> .
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.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
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 time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch). When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
task	A deliverable item on the detailed sourcing plan.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
tenant	In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
tiered pricing	Enables different portions of a schedule to be priced differently from one another.
time span	A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.
total cost	In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.
travel partner	In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
trace usage	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
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 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.
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 Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
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.
universal navigation header	Every PeopleSoft Enterprise 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.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access*.

user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise 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.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
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.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

yield by operation

In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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