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# PeopleSoft EPM 9.1: Workforce Analytic Applications

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June 2013

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PeopleSoft EPM 9.1: Workforce Analytic Applications  
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# Preface

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## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

### Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

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**Note:** Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

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### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<i>Typographical Convention</i>	<i>Description</i>
<b>Bold</b>	Highlights 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>	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  Italics also highlight references to words or letters, as in the following example: 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	Highlights a PeopleCode program or other code example.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

<b>Typographical Convention</b>	<b>Description</b>
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (   ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.
=>	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY\_CD\_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY\_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- 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 the PeopleSoft Online Help:

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

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## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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## Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

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## PeopleSoft EPM Related Links

[My Oracle Support](#)

[PeopleSoft Information Portal on Oracle.com](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

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Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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## Chapter 1

# Getting Started with PeopleSoft Workforce Analytic Applications

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## PeopleSoft Workforce Analytics Overview

Oracle's PeopleSoft Workforce analytic applications provide the tools to measure, manage, and maximize your workforce performance. The workforce analytic applications are:

- PeopleSoft Workforce Rewards for planning compensation and retention initiatives.
- PeopleSoft Workforce Planning for aligning your workforce competencies with organizational goals.
- PeopleSoft Workforce Scorecard for assessing the impact of your workforce on enterprise operations to determine how best to meet future business objectives.
- PeopleSoft EPM HCM Warehouse for analyzing your workforce trends, performing compensation and benefits comparisons, and gauging your effectiveness against external benchmark data.

See "Customer Scorecard Summary (*PeopleSoft EPM 9.1: Scorecard*)"

See "Understanding Workforce Planning Setup (*PeopleSoft EPM 9.1: Workforce Planning*)"

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## Prerequisites

Prior to implementing workforce analytic applications, you must complete the setup of EPM and the Operational Warehouse - Enriched (OWE). These tasks are described in *PeopleSoft Enterprise Performance Management Fundamentals*

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## PeopleSoft Workforce Analytics Process Flow

This section lists the steps to set up workforce analytic applications:

1. Import internal source data to OWS tables using Extract, Transform, and Load (ETL).
2. Review data warehouse tables that are delivered with the system.
3. Design and set up workforce-related trees.
4. Perform workforce-related dimension and tree node mapping.
5. Use ETL to load the OWE tables.
6. Review and edit data for D00s and R00s.

7. Review and modify the flat file definitions, data warehouse tables, and delivered ETL jobs for external survey data.

The remaining steps from here to the end of this list apply to HCM Warehouse and Workforce Rewards. External survey data is currently not incorporated into Workforce Planning.

8. Run the ETL jobs to populate the survey data warehouse tables and the survey mapping definition tables.
9. Review and edit the data in the survey data warehouse tables.
10. Complete survey mapping definition pages prior to running a Load ETL batch.
11. Review the survey mappings.
12. Run the next set of ETL jobs as needed.

## PeopleSoft Workforce Analytics Implementation

PeopleSoft Setup Manager enables you to review 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 documentation.

### Other Sources of Information

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

See the product documentation for

*PeopleTools: PeopleSoft Setup Manager*

## Common Elements Used in Workforce Analytics

This section lists common elements used in Workforce Analytics.

<b>SetID</b>	Provides the ID code for a tableset. A tableset is a group of tables (records) that are necessary to define your company's structure and processing options.
<b>Effective Date</b>	Establishes the date that the row in the table becomes effective. It determines when you can view and change the information. Pages and batch processes that use the information use the current row.
<b>Status</b>	Indicates whether a row in a table is active or inactive. You cannot select inactive rows on pages or use them for running batch processes.



<b>Description</b>	Allows text of up to 30 characters that describes what you are defining.
<b>Run Control ID</b>	Identifies specific run control settings for a process or report.
<b>Report ID</b>	Identifies the report.
<b>Program Name</b>	Provides the Enterprise Performance Management program name for which you are running the report or process.
<b>When</b>	Specifies the frequency with which you want to run a process. You can select <i>Once</i> , <i>Always</i> , or <i>Don't</i> .
<b>Last Run On</b>	Indicates the date on which the report or process was last run.
<b>As Of Date</b>	Indicates the last date for which the report or process includes data.
<b>Scenario ID</b>	Provides an identifier for a specific scenario.
<b>Model ID</b>	Provides an identifier for a model. A model uniquely identifies the types of data that you want to include in a scenario. For example, you might want to review revenue by region using a very high-level scope. Or, if you use Workforce Planning, you might want to review only those activities that relate to a certain product line for certain types of resources using a very narrow scope.
<b>Fiscal Year</b>	Specifies the fiscal year for your scenario or process run.
<b>Period</b>	Specifies the accounting period for the object being defined or process being run.
<b>Job ID</b>	Specifies an instance of an engine.

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## Deferred Processing

Several pages in Workforce Analytics operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

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## PeopleSoft Products

This documentation refers to these PeopleSoft products from Oracle:

- Oracle's PeopleSoft HRMS.

- Oracle's PeopleSoft Enterprise Performance Management.
- Oracle's PeopleSoft Workforce Planning.
- Oracle's PeopleSoft Workforce Rewards.

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## Related Product Documentation

The *PeopleSoft Workforce Analytic Applications* provides implementation and processing information for workforce analytic applications.

Additional, essential information describing the setup and design of your system appears in *PeopleSoft Enterprise Performance Management Fundamentals*

# Designing Your Workforce Analytics System

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## Defining Your Operational Structure

When you set up the Enterprise Performance Management (EPM) system, you define your operational structure using business units and SetIDs. This section reviews the logic that is specific to Workforce Analytics regarding the determination of business units, SetIDs, and currency codes when you are bringing workforce data into EPM.

Here are some common principles of the Operational Warehouse data structures and data migration logic:

- All fact tables (F00s) are keyed by business unit.
- Generally, dimension tables (D00s) are keyed by SetID, but depending on the source table or the business need of the EPM application, they may contain business units instead.
- Generally, reference tables (R00s) are keyed by SetID, but depending on the source table or the business need of the EPM application, they may contain business units instead.
- Each EPM business unit has one base currency code to support integrated data analysis on a common point.
- Each fact, dimension, or reference table that contains monetary values has an amount in the base currency of the related business unit (\*\_BCE\_AMT or \*\_BCE), and an amount in another currency with a code identifying that currency (\*\_AMT and CURRENCY\_CD).
- Each dimension or reference table that contains monetary values must have a SetID that relates only to business units with common base currency codes. (For example, if you have a salary structure defined in Canadian dollars that is keyed by a SetID, that SetID must relate only to business units with a base currency of Canadian dollars.)

The data migration logic that is specific to Workforce Analytics arises when the source table from Human Resources Management System (HRMS) has neither a business unit nor a SetID as a key. When this is the situation, you define the business unit or SetID to use, with the exception being tables that are keyed by employee ID. In this case, the business unit and corresponding base currency code are retrieved from the employee's job record.

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**Note:** Before you load internal source data into your data warehouse tables, map the business units from your HRMS system to the business units that you want to use in your PeopleSoft EPM system. Select Define Business Rules EPM, TableSets and Business Units, Source Unit Mapper.

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## Processing Multiple Currencies for Workforce Analytic Applications

In Workforce Analytics applications, each fact, dimension, or reference table that contains monetary values stores the amount in the original currency, along with a code identifying that currency. Generally, these values are stored in fields named \*\_AMT or \*\_RT, and CURRENCY\_CD. Tables containing monetary values also have a corresponding amount in the base currency of the related business unit. These values are known as base currency equivalent amounts (BCEs). Generally, BCEs are stored in fields named \*\_BCE\_AMT or \*\_BCE.

When you import source data, the data migration process loads the source amounts and currency codes. The process also by default changes BCE amounts to zero (or to the same value as the related amount field if your jobs have been configured). Then you run a subsequent currency conversion process that populates the BCE amount fields.

In HCM Warehouse and Workforce Rewards, certain Application Engine processes use the BCE amount rather than the amount field. As a result, the data migration process and the subsequent currency conversion process that populates the BCE amount fields are critical. You must remember to run the currency conversion process (PF\_MULT\_CURR) after loading monetary data. This process correctly supplies all of the BCE amounts for the Workforce Analytics tables in the warehouse. You must run this process before you can use any HCM Warehouse or workforce simulation data. When you run the currency conversion process, the base currency equivalent (\*\_BCE\_AMT or \*\_BCE) is calculated using the base currency code of the related EPM business unit, the source amount (\*\_AMT), and the source amount currency code (CURRENCY\_CD).

If your system is set up to run in a multiple-currency environment, set up and run the currency conversion process for the following tables and fields in the Operational Warehouse - Enriched (OWE):

<b>Table</b>	<b>Name of Base Currency Equivalent Amount Field</b>	<b>Name of Amount Field</b>
JOB_F00	ANNL_BBASE_BCE_AMT	ANNL_BENEF_BASE_RT
JOB_F00	ANNUAL_BCE_AMT	ANNUAL_RT
JOB_F00	CHANGE_BCE_AMT	CHANGE_AMT
JOB_F00	COMPRATE_BCE_AMT	COMPRATE
JOB_F00	HOURLY_BCE_AMT	HOURLY_RT
JOB_F00	MONTHLY_BCE_AMT	MONTHLY_RT
JOBCODE_D00	SURVEY_SAL_BCE_AMT	SURVEY_SALARY
JOB_INTRADY_F00	ANNL_BBASE_BCE_AMT	ANNL_BENEF_BASE_RT
JOB_INTRADY_F00	ANNUAL_BCE_AMT	ANNUAL_RT
JOB_INTRADY_F00	CHANGE_BCE_AMT	CHANGE_AMT
JOB_INTRADY_F00	COMPRATE_BCE_AMT	COMPRATE

<b>Table</b>	<b>Name of Base Currency Equivalent Amount Field</b>	<b>Name of Amount Field</b>
JOB_INTRADY_F00	DAILY_BCE_AMT	DAILY_RT
JOB_INTRADY_F00	CTG_RATE_BCE	CTG_RATE
JOB_INTRADY_F00	GVT_ANLRTNOLOC_BCE	GVT_ANLRTNOLOC
JOB_INTRADY_F00	GVT_ANUITYOFST_BCE	GVT_ANUITYOFST
JOB_INTRADY_F00	GVT_BIWEEKLYRT_BCE	GVT_BIWEEKLYRT
JOB_INTRADY_F00	GVT_BWRTRNOLOC_BCE	GVT_BWRTRNOLOC
JOB_INTRADY_F00	GVT_COMPRATE_BCE	GVT_COMPRATE
JOB_INTRADY_F00	GVT_DAILY_RT_BCE	GVT_DAILY_RT
JOB_INTRADY_F00	GVT_DLYRTNOLOC_BCE	GVT_DLYRTNOLOC
JOB_INTRADY_F00	GVT_FEHB_PCT_BCE	GVT_FEHB_PCT
JOB_INTRADY_F00	GVT_FGLIBSCPCT_BCE	GVT_FGLIBSCPCT
JOB_INTRADY_F00	GVT_FGLIOPTPCT_BCE	GVT_FGLIOPTPCT
JOB_INTRADY_F00	GVT_HRLYRTNOLC_BCE	GVT_HRLYRTNOLC
JOB_INTRADY_F00	GVT_LIVING_AMT_BCE	GVT_LIVING_AMT
JOB_INTRADY_F00	GVT_LOCALITYADJ_BCE	GVT_LOCALITYADJ
JOB_INTRADY_F00	GVT_MNLYRTNOLC_BCE	GVT_MNLYRTNOLC
JOB_INTRADY_F00	HOURLY_BCE_AMT	HOURLY_RT
JOB_INTRADY_F00	MONTHLY_BCE_AMT	MONTHLY_RT
JOB_INTRADY_F00	UNION_FEE_AMT_BCE	UNION_FEE_AMOUNT
SAL_GRADE_D00	MAX_RT_ANN_BCE_AMT	MAX_RT_ANNUAL
SAL_GRADE_D00	MAX_RT_HR_BCE_AMT	MAX_RT_HOURLY
SAL_GRADE_D00	MAX_RT_MON_BCE_AMT	MAX_RT_MONTHLY
SAL_GRADE_D00	MID_RT_ANN_BCE_AMT	MID_RT_ANNUAL
SAL_GRADE_D00	MID_RT_HR_BCE_AMT	MID_RT_HOURLY
SAL_GRADE_D00	MID_RT_MON_BCE_AMT	MID_RT_MONTHLY
SAL_GRADE_D00	MIN_RT_ANN_BCE_AMT	MIN_RT_ANNUAL

<b>Table</b>	<b>Name of Base Currency Equivalent Amount Field</b>	<b>Name of Amount Field</b>
SAL_GRADE_D00	MIN_RT_HR_BCE_AMT	MIN_RT_HOURLY
SAL_GRADE_D00	MIN_RT_MON_BCE_AMT	MIN_RT_MONTHLY
SAL_STEP_D00	ANNUAL_BCE_AMT	ANNUAL_RT
SAL_STEP_D00	HOURLY_BCE_AMT	HOURLY_RT
SAL_STEP_D00	MONTHLY_BCE_AMT	MONTHLY_RT
WA_BEN_HST_F00	WA_ANNUAL_BCE_AMT	WA_ANNUAL_AMT
WA_COMP_HST_F00	WA_AMOUNT_BCE	WA_AMOUNT
WA_RECR_EXP_F00	PER_EE_CST_BCE_AMT	PER_EE_COST
WA_TRNCST_F00	PER_EE_CST_BCE_AMT	PER_EE_COST
WA_TRNCST_F00	TUIT_REIMB_BCE_AMT	TUIT_REIMB_AMT

**Note:** For any configured fields other than those delivered, modify the delivered Application Engine process, job, and rule sets to include your custom fields. If your implementation does not have a multiple currency environment, you do not need to run the currency conversion process by remapping the Extract, Transform, and Load (ETL) jobs to supply all BCE amounts with the corresponding source amounts.

## Prerequisites

Before you run the Multicurrency engine, you must properly set up your currency conversion rules using the Currency Conversion Rule page. Follow these steps:

1. Access the Currency Conversion Rule page.
2. Click the Add button to add a new currency conversion rule.
3. Enter an effective date, status, and rate type.
4. In the From Currency Code Column field, enter *CURRENCY\_CD*.
5. In the To Currency Code Column field, enter *CURRENCY\_CD*.

The field name here does not matter because the multicurrency processing uses the base currency value for the business unit. However, this field name is mandatory on the currency mapping page.

## Related Links

"Understanding EPM Multiple Currency Processing Concepts (*PeopleSoft 9.1: Enterprise Performance Management Fundamentals*)"

"Setting Up and Running Currency Conversion (*PeopleSoft 9.1: Enterprise Performance Management Fundamentals*)"

---

## Setting Up TableMaps and DataMaps

In some workforce analytic applications, you specify datasets, filters, or constraints for use in creating scenarios. They are based on TableMaps, and provide a user-defined set of information to the engines. Here are some examples of the ways you can use TableMap-based datasets, filters, or constraints in workforce analytic applications:

- In datasets when you are setting up data elements in the Compensation Strategy module of Workforce Rewards.
- In constraints or filters for setting up key performance indicators (KPIs) in Workforce Scorecard.
- In constraints or filters to set up workforce groups for use in Workforce Rewards and Workforce Planning.
- In TableMaps, DataMaps, constraints, and filters when building data marts for Workforce Rewards.

In Workforce Analytics, Oracle delivers numerous workforce-related TableMaps and DataMaps to help streamline the process for you. To review the delivered TableMaps, or create additional ones, access the pages using the following navigation:

- EPM Foundation, Foundation Metadata, Metadata Creation and Editing, TableMap
- EPM Foundation, Foundation Metadata, Metadata Creation and Editing, DataMap

---

## Creating Model IDs, Scenario IDs, and Jobstream Metadata

You must set up the metadata for your model IDs and scenario IDs using the EPM Foundation tools. Sample data models and scenarios are delivered as examples, but are not system data. To create your models and scenarios, access the pages using the following navigation:

- EPM Foundation, Business Metadata, Business Framework, Models
- EPM Foundation, Business Metadata, Business Framework, Scenarios

For each business process module requiring Application Engine processing, Oracle delivers Application Engine IDs, job IDs, and jobstreams as system data. The delivered metadata is discussed in the relevant sections of the workforce application documentation. If you need to create additional jobs or jobstreams, access the pages using the following navigation:

- EPM Foundation, Job Processing, Setup Engines and Jobstreams, Job Metadata
- EPM Foundation, Job Processing, Setup Engines and Jobstreams, Processes in Jobstream

### Related Links

"Understanding Models and Scenarios (*PeopleSoft 9.1: Enterprise Performance Management Fundamentals*)"

"Understanding Jobstreams (*PeopleSoft 9.1: Enterprise Performance Management Fundamentals*)"

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## Reviewing the Operator Defaults Page

You access the Operator Defaults page by selecting Workforce Analytics, Workforce Analytics Setup, Operator Defaults. The purpose of the page is to enter default values for search keys (business unit, scenario ID, year) that are used to access the Workforce Analytics pagelets through a portal. This functionality is documented in *PeopleSoft Enterprise Performance Management Portal Pack* in the topic entitled "Workforce Analytics Pagelets."



## Chapter 3

# Importing Internal Source Data to Data Warehouse Tables

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## Understanding Internal Source Data

Internal source data is the data from your organization's Human Resources Management System (HRMS) system, or other enterprise management systems, that you use to populate the Operational Warehouse - Enriched (OWE) tables. You first import the data from the HRMS system into the Operational Warehouse Staging (OWS) tables using the IBM WebSphere DataStage tool. This topic assumes that you have done this already. Then you use the ETL process to load the data from the OWS into the data warehouse tables (OWE).

---

## Reviewing Delivered ETL Jobs and Data Warehouse Tables

To review the delivered ETL jobs and data warehouse tables:

1. Begin by evaluating your own internal source tables and planning your approach.
2. Use PeopleTools Application Designer to review the OWS tables and data warehouse tables that are delivered with EPM. Determine how to structure your system to best fit the needs of your organization.
3. Evaluate the ETL jobs that are delivered with the IBM WebSphere DataStage Project and determine whether they are properly configured to meet the needs of your organization.
4. See My Oracle Support for a listing of table-loading sequences for mapping PeopleSoft application data to the OWS tables and data warehouse tables.

---

**Warning!** Any changes that you make to the delivered data warehouse tables have the potential to affect Application Engine processes and PeopleCode processing throughout the system. Evaluate and make these types of changes very carefully.

---

## Setting Up Trees

This section provides an overview of Workforce Analytics trees and discusses how to:

- Review trees used in Workforce Analytics.
- Set up the account tree.
- Set up the compensation code tree.

- Set up the competency tree.
- Set up the financials-related department tree.
- Set up the FINCODE tree.
- Set up the geography tree.
- Set up the organization tree.
- Set up the INDUSTRY tree.
- Set up the JOBCODE tree.
- Set up the position tree.
- Set up the UNITCODE tree.
- Define which trees the system uses.

## Understanding Workforce Analytics Trees

Trees define hierarchical relationships for dimensions in Enterprise Performance Management (EPM). Trees add a visual layer to dimensions, helping you see where detail items (such as departments or job codes) fit into your organization's structure. Insight analysis templates in the HCM Warehouse use these hierarchical relationships to facilitate drilldown and roll-up through dimension data. The system also uses these trees to control and organize processing rules.

---

**Warning!** PeopleTools does not require you to use levels when creating trees. However, in EPM, the use of levels is required whenever a tree is referenced by the Insight analysis templates for the HCM Warehouse. Workforce Analytics trees provide a hierarchical roll-up structure for the system dimensions. If you don't use levels within your trees, the analysis templates cannot access the data in the data warehouse tables. For each of the trees discussed in this section, you must specify the use of levels on the Tree Definition Properties page, and you must define each level. The maximum number of tree levels that you can define for trees used with Insights is 16.

---

The following table defines some of the terms used in a subsequent table to summarize the main trees in Workforce Analytics.

### Tree Category

This is the first level that you see when you open PeopleTools Tree Manager to view the sample trees. The following two categories are especially important for Workforce Analytics:

- *SHARE*: This category indicates that the tree is used across the entire Enterprise Performance Management product line. This category contains sample trees only, having a SetID of *SHARE*.
- *WA*: This category indicates that the tree is used primarily within the workforce analytic applications. This category contains sample trees that must be used as templates for Workforce Analytics to function properly. These trees have a SetID of *MODEL* or *SHARE*. The ones with SetID *SHARE*

are sample trees. The ones with *SetIDMODEL* are templates that your tree must look like.

### Tree Structure ID

This identification code corresponds to one of the main dimensions in the system. When you set up your trees in your system database, the following tree structure IDs must be used for Workforce Analytics to function properly: JOB\_WA01, CMP\_WA02, GEO\_WA03, IND\_WA04, FIN\_WA05, UNT\_WA06, and ORG\_WA07, POS\_WA08.

### Tree Name

This is the name for an individual tree. You must create your own trees, and you can give them any names you choose.

### Sample

This identifies the tree that is delivered as sample data in your demo database (SetID = SHARE or MODEL). Trees with a SetID of SHARE are for your use as an *example*. The one tree with a SetID of MODEL is for you to use as *template* for creating your tree.

## Reviewing Trees Used in Workforce Analytics

The following table lists the trees that you may need to set up for the various workforce analytic applications. The last column uses these abbreviations:

<b>PWSC</b>	Workforce Scorecard
<b>PWFI</b>	HCM MDW
<b>PWRW</b>	Workforce Rewards
<b>PWDP</b>	Workforce Planning

<b>Tree Structure ID/ Tree Name/ Dimension Name</b>	<b>Use Sample with SetID of</b>	<b>Tree Category (SHARE or WA)</b>	<b>Workforce Analytics Application</b>
ACCOUNT / WFA_ACCOUNT / WFA Account	SHARE	SHARE	PWSC, PWFI
CMP_WA02 / COMPCODE / Compensation Code	MODEL	WA	PWSC, PWFI, PWRW
WA_COMPTENCY / WP_COMPETENCY / Competency	SHARE	WA	PWDP (optional)
DEPT ID / DEPARTMENT / (Financials-Related) Department	SHARE	SHARE	PWSC, PWFI
FIN_WA05 / FINCODE / Financial Size	SHARE	SHARE	PWRW

<i>Tree Structure ID/ Tree Name/ Dimension Name</i>	<i>Use Sample with SetID of</i>	<i>Tree Category (SHARE or WA)</i>	<i>Workforce Analytics Application</i>
GE0_WA03 / GEOGRAPHY / Geography	SHARE	SHARE	PWFI, PWRW PWDP (optional)
ORG_WA07 / ORG/DEPT_SECURITY / Organization (or Department)	SHARE	SHARE	PWFI, PWRW PWDP (optional)
IND_WA04 / INDUSTRY / Industry Type	SHARE	SHARE	PWRW
JOB_WA01 / JOBCODE / Job Code	SHARE	SHARE	PWFI, PWRW
POS_WA08 / POSITION / Position	SHARE	SHARE	PWFI
UNT_WA06 / UNITCODE / Unit Size	SHARE	SHARE	PWRW

---

**Note:** Before you begin building your trees, you can load the dimension data needed to build the trees. You can load the remainder of the dimension data later. Before you load any dimension data into your system, Oracle strongly recommends that you read the remainder of this topic and the topic in this documentation entitled "Importing External Survey Data into Data Warehouse Tables."

---

**Note:** If your implementation includes HCM MDW, depending on the reporting tool that you choose, you may need to flatten the PeopleSoft dimension trees before processing them. Consult your system's implementation team.

---

## Setting Up the Account Tree

This tree provides structure for the WFA account (Workforce Analytics account) dimension for general ledger roll-up and drilldown.

It is a standard tree, meaning that it has leaves, or details. You can expand the number of levels of nodes and add nodes, and you can change and add details as needed to suit the revenue and expense account structure for your organization.

## Setting Up the Compensation Code Tree

This tree provides structure for the compensation code dimension. When you create your tree, you must use a tree structure ID of CMP\_WA02. All earnings codes, deduction codes, benefits plan types, and pay item name codes from your source data must map to a compensation code if you plan to include them in your analysis.

It is a winter tree, meaning that it has nodes, but no details. The Model version of the tree has the minimum number of levels and the necessary nodes required for the system to aggregate your compensation data properly. The delivered nodes must be used for data to be correctly interpreted by the system.

You can add lower levels of nodes and add nodes to the existing levels as needed to suit the needs of your organization. To add nodes, you use the Compensation Code page (COMPCODE\_D00).

On the COMPCODE tree, all regular base pay plans should point to or roll up into the tree node 600 Regular Base Compensation. Overtime earnings codes should point to or roll up into the 610 Premium Base Compensation tree node. Similarly, all health benefit plans should point to or roll up into the 550 Medical tree node, under the 450 Health & Welfare Benefits tree node.

Later in the setup process, you use the compensation mapping pages to map your earnings codes and deduction codes to these compensation codes.

## Related Links

[Mapping Compensation Codes and Plan Values](#)

## Setting Up the Competency Tree

This tree provides structure for the competency dimension, that is, you can use it to provide a hierarchical structure for competency groupings. The competency tree is used in Workforce Planning, although its use is optional. If you choose to use a competency tree, then you must use tree structure WA\_COMPETENCY. Use the sample tree that Oracle delivers (tree structure WA\_COMPETENCY, tree name WP\_COMPETENCY) as an example. The nodes are competencies and no details are available. Note that this is not exactly the same as the HRMS competency tree, which has nodes that are competency types and details that are competencies.

## Setting Up the Financials-Related Department Tree

This tree provides structure for the financials-related department dimension. The system uses this tree to roll up account data through the accounting relationship for your departments.

It is a standard tree, meaning that it has leaves, or details. You can expand the number of levels of nodes and add nodes, and change and add details as needed to suit the financial roll-up structure of the departments in your company.

The details, or leaves, for the DEPARTMENT tree come from the DEPARTMENT\_TBL.DEPTID field. Either you import, using ETL, the department IDs that populate the DEPARTMENT\_TBL table, or you add or change departments using the Department Table page.

## Setting Up the FINCODE Tree

This tree provides a hierarchical structure for the financial size dimension. This tree is used primarily in the Workforce Rewards Market Compensation module to deal with importing external survey data. You use financial codes to define the relative financial size of an organization, categorize data from external survey sources, and validate comparison to data for your organization. When you create your tree, you must use a tree structure ID of FIN\_WA05.

It is a winter tree, meaning that it has no leaves, or details. You can change the labels and range values for the nodes to financial categories appropriate for your industry. Use the WA\_FINCODE\_D00 page to create the nodes for the tree.

## Setting Up the Geography Tree

This tree provides structure for the geography dimension. When you create your tree, you must use a tree structure ID of GEO\_WA03. All locations (from the location table) for your internal source data must map to, and roll up to, a geography ID (identification) code.

It is a winter tree, meaning it has no leaves, or details.

Review all of your locations in your internal source data, and determine the GEOGRAPHY tree nodes (geography ID codes) that you want them to map to. Then use the Geography page to create the Geography ID codes used for the nodes of the tree.

After you've created a GEOGRAPHY tree, map all of your location codes to nodes on this tree. You can import your locations into the LOCATION\_D00 table, or add or change locations using the Locations page. Later in the setup process, you use the WA\_LOCATION\_MAP page to map your locations to these geography ID codes.

### Related Links

[Mapping Locations to Geography ID Codes](#)

## Setting Up the Organization (Department) Tree

This tree provides structure for the organizationally related department dimension. When you create your tree, you must use a tree structure ID of ORG\_WA07. In this structure, your departments are tied to their organizational reporting hierarchy. The system uses this tree to roll up departmental-level data, such as compensation data for employees within departments. A secondary purpose of this tree is to provide a reference for setting up row-level employee security.

It is a winter tree, meaning it has no details, or leaves. It uses the departments from the department table (DEPARTMENT\_TBL) for its nodes.

---

**Note:** If your implementation includes row-level security at the employee level, based on JOB\_F00 and PERSONAL\_D00, then first load the JOB\_F00 and PERSONAL\_D00 tables before setting up security.

---

## Setting Up the INDUSTRY Tree

This tree provides structure to the industry type dimension. Industry codes are used primarily in the Workforce Rewards Market Compensation module to deal with importing external survey data. You use industry codes to define the industry that an organization is in, categorize data from external survey sources, and validate comparison to data for your organization.

It is a winter tree, meaning it has no leaves, or details. When you create your tree, you must use a tree structure ID of IND\_WA04. Use the WA\_INDUSTRY\_D00 page to create the nodes for the tree, called industry ID codes. You can change the labels and range values for the nodes to industries that are more appropriate for your organization.

## Setting Up the JOBCODE Tree

This tree provides structure for the job code dimension. When you create your tree, you must use a tree structure ID of JOB\_WA01. The JOBCODE tree must have at least two levels. The highest level is for all

job codes. The next level down is for logical groupings of job codes into tree nodes called job code sets. The leaves of the job code set nodes are the individual job codes.

This is a standard tree, meaning it has details, or leaves.

You use the Job Code Set page to create the nodes for the tree. A job code set is a group of related job codes, or any node on the JOBCODE tree. Most nodes are only labels to define relationships. The real meaning is in the details of the tree, which are the job codes grouped together under that node. You either import your job codes to the JOBCODE\_D00 table using ETL, or view and edit job codes using the Job Code page.

## Setting Up the Position Tree

This tree provides structure for the position dimension. When you create your tree, you must use a tree structure ID of POS\_WA08. You import position data into the POSITION\_D00 table. You can use the POSITION\_D00 page to access these positions and use them for the nodes for the tree.

It is a winter tree, meaning it has no details, or leaves. It uses the positions from the position table (POSITION\_D00) for its nodes.

## Setting Up the UNITCODE Tree

This tree provides structure for the unit size dimension. Unit codes are used primarily in the Workforce Rewards Market Compensation module to deal with importing external survey data. You use unit codes to define the relative size of an organization (using a criteria other than a financial one), categorize data from external survey sources, and validate comparison to data for your organization.

It is a winter tree, meaning it has no leaves, or details. When you create your tree, you must use a tree structure ID of UNT\_WA06. You use the WA\_UNITCODE\_D00 page to create the nodes for the tree, called unit codes. You can change the labels and range values for the nodes to a unit of measure that is more appropriate for your industry.

## Defining Which Trees the System Uses

After you have set up trees for Workforce Analytics, use the Workforce Analytics, Workforce Setup, Setup Workforce Trees page to define which versions of the trees the system uses. The page is discussed in detail in the topic titled "Importing External Survey Data to Data Warehouse Tables."

### Related Links

[Setting Up Trees](#)

---

## Mapping Personnel Actions for JOB\_F00

To map personnel actions for JOB\_F00, use the WA\_ACTN\_RSN\_DFN.GBL component.

This section discusses how to:

- Review source table action and reason codes.
- Define action types.

- Map action and reason combinations.
- Review your personnel action mappings.
- Load your personnel action data.

## Pages Used to Map Personnel Actions for JOB\_F00

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Action Type	WA_ACTION_TYPE	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Action Type.	Define personnel action types, and map them to personnel action types from benchmark metrics surveys. The primary purpose of the action type definition is to facilitate roll-up and drilldown for this attribute in the HCM Warehouse Insight analysis templates.
Action Reason Map	WA_ACTN_RSN_DFN	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Action Reason Map.	Map action and reason combinations from your HRMS system to the Voluntary Term (voluntary termination) field in EPM. You can also map the action and reason combinations to benchmark survey action type codes on using this page. The two primary purposes of these attributes are to facilitate high-level action counts and turnover metrics in the HCM Warehouse Insight analysis templates.

## Reviewing Source Table Action and Reason Codes

Review your HRMS source table (PS\_ACTN\_REASON\_TBL) and identify all the valid combinations of action code and reason code that you want to use in EPM. Then determine whether they should map to one of the workforce termination values: *Voluntary*, *Involuntary*, or *Not a Termination*.

Also review your HRMS source table action codes and determine which action types to group them into. For example, your human resources organization may already have standard action types, or you may want to use the same action types used by your company's third-party provider of benchmark metric data.

## Action Type Page

Use the Action Type page (WA\_ACTION\_TYPE) to define personnel action types, and map them to personnel action types from benchmark metrics surveys.

The primary purpose of the action type definition is to facilitate roll-up and drilldown for this attribute in the HCM Warehouse Insight analysis templates.



## Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Action Type.

### Image: Action Type setup page

This example illustrates the fields and controls on the Action Type setup page. You can find definitions for the fields and controls later on this page.

---

**Note:** No ETL job is delivered for the WA\_ACTION\_TYPE table. You define action types online prior to running ETL.

---

**Warning!** The action type values of HIR (Hire), OTH (Other), PRO (Promotion), SEP (Separation), and XFR (Transfer) are hard-coded in the data mart processing logic.

---

#### Action Type

The personnel action type code that you entered to access this page is displayed at the top of the page. After you've created these codes, you can use them on the Action Reason Map page.

#### Benchmark Action Type

Select a benchmark action type from the list of valid values. You map your action type to a standardized personnel action type that is used in many benchmark metrics surveys. Valid values are *Hire, Other, Promotion, Separation, and Transfer*. *Other* includes all other action types that are not hires, separations, transfers, or promotions.

## Action Reason Map Setup Page

Use the Action Reason Map page (WA\_ACTN\_RSN\_DFN) to map action and reason combinations from your HRMS system to the Voluntary Term (voluntary termination) field in EPM.

You can also map the action and reason combinations to benchmark survey action type codes on using this page. The two primary purposes of these attributes are to facilitate high-level action counts and turnover metrics in the HCM Warehouse Insight analysis templates.

## Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Action Reason Map.

### Image: Action Reason Map setup page

This example illustrates the fields and controls on the Action Reason Map setup page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web form titled "Maintain Dimension". At the top, it displays "SetID: SHARE" and "Reason Code: CON". Below this is a "Details" section with a search bar and navigation controls. The form contains several fields:
 

- \*Effective Date: 01/01/1900 (with a calendar icon)
- \*Status: Active (dropdown menu)
- \*Description: Add Non-Employee - Consultant (text input)
- Voluntary Term: Not a Termination Action (dropdown menu)
- Action Type: HIR (text input with a search icon)

**Note:** No ETL job is delivered for the WA\_ACTN\_RSN\_DFN table. You map action and reason combinations online prior to loading the OWE table.

#### Action Code

To open the page, you select an action code, which is a translate table value. The valid values are based on the translate table values for the action code field in HRMS.

#### Reason Code

Enter a reason code, if one exists. Enter only what you consider valid combinations of action and reason from HRMS. For example, your organization may not want to use a combination in which the action is *Separation*, and the reason is *Null*.

#### Voluntary Term (voluntary termination)

In workforce analytic applications, some of the turnover metrics in the data marts require the ability to define whether an action and reason combination results in a termination, and whether the termination is voluntary or involuntary. Enter the voluntary termination code to which you want to map this action and reason combination. Valid values are from the translate table, and include *Involuntary*, *Voluntary* and *Not a Termination*.

#### Action Type

Enter the action type to which you want to map this action and reason code combination. Prompt values are from the WA\_ACTION\_TYPE table, which you created using the Action Types setup page.

## Loading Your Personnel Action Data

After you've completed the two mapping pages, use ETL to import your personnel action data into the data warehouse tables. For each incoming row of employee data, the process validates the reason code against the WA\_ACTN\_RSN\_DFN table. If a mapping exists, then the system places the appropriate value (voluntary, involuntary, or not a termination), along with the row of data, into the Job Data

(JOB\_F00) table. If no reason code mapping is on the WA\_ACTN\_RSN\_DFN table, then the data goes to the error table.

## Mapping Locations to Geography ID Codes

To map locations to geography ID codes, use the WA\_LOCN\_MAP\_DFN.GBL component.

EPM uses a hierarchical structure for the geography dimension based on geography ID codes and the geography tree. Locations roll up into geography ID codes for geographical regions.

This section discusses how to:

- Review and load source table location codes.
- Enter geography IDs and create a geography tree.
- Map locations to geography IDs.
- Review your location and geography ID mappings.

**Warning!** For best results, locations should be mapped to unique geographies. If you have employees who may work simultaneously in two different jobs within the same department but in different locations, then you *must* uniquely map locations to geographies to ensure that the Workforce Data Mart logic works correctly. Note that the geography dimension of the Workforce Data Mart is tree-based, so if you want to aggregate employee data from multiple locations, you can view the Workforce Data Mart at a higher, more aggregated level of the Geography dimension (that is, at a higher node in the Geography tree).

### Page Used to Map Locations to Geography ID Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Geography ID Map	WA_LOCN_MAP_DFN	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Setup Geography ID Map	Map location codes to Geography IDs. These mappings are stored in the WA_LOCN_MAP_DFN table.

### Reviewing and Loading Source Table Location Codes

Review your HRMS location table. In Workforce Analytics, each location must roll up to a geographical region on the geography tree. For each of your locations, determine the type of geographical regions to which you want to map them.

For the first time setup, either load your HRMS locations to the LOCATION\_D00 table without mapping, or manually enter the locations using the LOCATION\_D00 page.

### Entering Geography IDs and Creating a Geography Tree

Create a GEOGRAPHY tree in which the nodes of the tree are geography IDs. Enter the nodes of the GEOGRAPHY tree using the Geography page. The values are stored in the GEOGRAPHY\_D00 table.

## Related Links

[Setting Up the Geography Tree](#)

## Geography ID Map Page

Use the Geography ID Map page (WA\_LOCN\_MAP\_DFN) to map location codes to Geography IDs.

These mappings are stored in the WA\_LOCN\_MAP\_DFN table.

### Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Setup Geography ID Map

### Image: Geography ID Map setup page

This example illustrates the fields and controls on the Geography ID Map setup page. You can find definitions for the fields and controls later on this page.

**Maintain Dimension**

SetID: SHARE      Location: W00010

Details Find | View All | First 1 of 1 Last

\*Effective Date: 01/01/1900        \*Status: Active

**Location Code**

Location Code: W00010  
 City: Vancouver  
 County:  
 State: BC      Postal Code: V2Q 2X5      Country: CAN

**Geography ID**

\*Geography ID: BC       British Columbia

### Location Code

The City, County, State, Postal Code, and Country for this Location Code fields are supplied from the LOCATION\_D00 table. Locations in different countries may display different address fields depending on the formatting that you previously defined in the Country Table, Address Format page.

### Geography ID

Because Geography ID is not a part of the HRMS location table (PS\_LOCATION\_TBL), you must map each location to a geography ID. Select the geography ID code to which you want to map this location code. You are prompted with valid values from the GEOGRAPHY\_VW table, and represent nodes on the GEOGRAPHY tree. You create geography IDs using the Geography page. Your mappings are stored in the WA\_LOCN\_MAP\_DFN table.

## Mapping Compensation Codes and Plan Values

To map compensation codes and plan values, use the WA\_COMP\_ERN\_MAP.GBL, WA\_COMP\_PIN\_MAP.GBL, WA\_COMP\_DED\_MAP.GBL, and WA\_BEN\_VALU\_TBL.GBL components.

This section discusses how to:

- Review source table earnings, deductions, and benefits.
- Enter compensation codes and create a COMPCODE tree.
- Load source table dependencies.
- Map deductions and benefit plans to compensation codes.
- Map earnings to compensation codes.
- Map pay item names to compensation codes.
- Enter benefit plan values.
- Review benefits valuation maps.
- Load compensation data.

### Pages Used to Map Compensation Codes and Plan Values

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Compensation Deduction Map	WA_COMP_DED_MAP	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Compensation, Compensation Deduction Map	Map deduction codes and benefits plans from the HRMS system to compensation codes in EPM. Mappings are stored in the WA_COMP_DED_MAP table.
Compensation Earnings Map	WA_COMP_ERN_MAP	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Compensation, Compensation Earnings Map	Map earnings codes from the HRMS system to compensation codes in EPM. Mappings are stored in the WA_COMP_EARN_MAP table.
Compensation GP Pin Map	WA_COMP_PIN_MAP	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Compensation, Compensation GP Pin Map	Map PIN (pay item name) codes from PeopleSoft Global Payroll to compensation codes in the EPM. Mappings are stored in the WA_COMP_PIN_MAP table.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Benefits Valuation Map	WA_BEN_VALU_TBL	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Benefits, Benefits Valuation Map	Assign a monetary amount to a benefit to distinguish whether the amount is an employee cost, employee value, or employer's cost. The benefits amounts and values that you enter using this page are stored on the WA_BEN_VALUE_TBL table. Use this page for compensation codes that you have already set up in the COMPCODE tree and mapped in the Comp Deduction Code Map (HR) page.

## Reviewing Source Table Earnings, Deductions, and Benefits

To load compensation data, the system uses the following HRMS source tables:

<b>Compensation Type</b>	<b>HRMS Source Tables</b>
Deductions	PS_PAY_DEDUCTION, PS_PAY_CHECK, and PS_TOTAL_DED.
Benefits	PS_DEPENDENT_BENEF, PS_COVRG_CD, PS_HEALTH_BENEFIT, PS_LIFE_ADD_BEN, PS_DISABILITY_BEN, PS_FSA_BENEFIT, PS_SAVINGS_PLAN, PS_VACATION_BEN, PS_LEAVE_PLAN, PS_CAR_PLAN, PS_RTRMNT_PLAN, and PS_PENSION_PLAN.
Earnings	PS_PAY_EARNINGS, PS_PAY_CHECK, and PS_PAY_OTH_EARNS
Pay Item Names	PS_GP_RSLT_ERN_DED and PS_GP_PIN

Generate a list of the HRMS deduction and earnings codes, benefits plans and plan types, and pay item names (PINs). Use this list to determine which ones to import into EPM. Each earnings code, deduction code, benefit plan, and PIN code that you want to import into EPM must map to one compensation code in the target system. Multiple codes and plan types can map to the same compensation code, or each one can have a separate compensation code.

Also determine whether any of these deductions, earnings, or benefit plan types normally don't have cost or value data stored in the HRMS system. Most commonly, this occurs for benefit plan-related information. For those items in need of a cost or value, first determine the cost or value, and then also determine whether it applies to the employee, the employer, or both. For example, assume that your company allows employees to enroll in a dental plan, and neither the employee nor the employer costs or values of the dental plan are tracked through payroll. In this situation, you may want to set up data in EPM to track the dental plan costs and to whom these costs apply.

## Entering Compensation Codes and Creating a COMPCODE Tree

When you have a plan for mapping your compensation codes from the HRMS source tables to EPM, you create your compensation codes on the Compensation Code page and create the COMPCODE tree.

### Related Links

[Setting Up the Compensation Code Tree](#)

## Loading Source Table Dependencies

On the compensation and benefits mapping pages, certain fields are supplied from OWS tables. You populate the OWS tables by ETL prior to beginning work on setting up Workforce Analytics. The following table summarizes the prompts for fields on the compensation and benefits mapping pages:

<b>Compensation or Benefit Mapping Page</b>	<b>OWS Prompt Tables</b>
Compensation Deduction Map	Prompt values for deductions come from WA_PLAN_DED_VW and WA_PLAN_TYP_VW. These views in turn look at DEDUCTION_TBL and BENEF_PLAN_TBL.
Compensation Earnings Map	Prompt values for earnings come from EARNINGS_TBL.
Compensation GP Pin Map	Prompt values for pay item names come from the GP_PIN_TYPE table and WA_PLAN_PIN_VW table. These views in turn look to the GP_PIN table.

## Compensation Deduction Map Page

Use the Compensation Deduction Map page (WA\_COMP\_DED\_MAP) to map deduction codes and benefits plans from the HRMS system to compensation codes in EPM.

Mappings are stored in the WA\_COMP\_DED\_MAP table.

## Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Compensation, Compensation Deduction Map

### Image: Compensation Deduction Map setup page

This example illustrates the fields and controls on the Compensation Deduction Map setup page. You can find definitions for the fields and controls later on this page.

Benefit Plan	Deduction Code	Coverage Code	Description	*Compensation Code	Description	*Amount Type	Description
KUHMO1	KUHMOK	1	Employee Only	550	Medical	4	Employee Val and Employer Exp
KUHMO1	KUHMOK	2	Employee + Spouse	550	Medical	2	Employee Expense
KUHMO1	KUHMOK	2	Employee + Spouse	550	Medical	4	Employee Val and Employer Exp

### Plan Type

When you access the page, you are prompted to specify a plan type. Valid values are from the translate table. If this mapping is for a general deduction, select *General Deduction*.

### Mapping Benefit Plan Types

To map a benefit, select from available plan types, other than *General Deduction*, that are summarized in the following table:

<b>Plan Type</b>	<b>Description</b>	<b>Plan Type</b>	<b>Description</b>
401(k)	401(k) Retirement Account	PERS	Public Employees Retirement System
AD/D	Accidental Death or Dismemberment Insurance	Personal	Personal Leave
Benefits Program	Benefits Program	Profit Sharing	Profit Sharing
Capital Accumulation	Capital Accumulation	Retirement Counseling Canada	Canadian Retirement Counseling
Company Car	Company Car	Short-term Disability	Short-term Disability Insurance
Dental	Dental Insurance	Sick	Sick Leave
Dependent AD/D	Dependent Accidental Death or Dismemberment Insurance	Standard Pension	Standard Pension (Canada)



<b>Plan Type</b>	<b>Description</b>	<b>Plan Type</b>	<b>Description</b>
Dependent Care	Dependent Care Flexible Spending Account	Supplemental AD/D	Supplemental Accidental Death and Dismemberment Insurance
Dependent Life	Dependent Life Insurance	Supplemental Life	Supplemental Life Insurance
Employee Stock Purchase Plan	Employee Stock Purchase Program	Supplemental Pension	Supplemental Pension ( Canada)
Family and Medical Leave Act	Family Medical Leave Act	Survivors Income	Survivors Income
General Deduction	General Deductions	Thrift	U.S. federal government employee Thrift Savings Plan
Health Care Can	Canadian Health Care	USDB Pension Plan 1	U.S. Defined Benefit Pension Plan 1
Health Care	Health Care Flexible Spending Account	USDB Pension Plan 2	U.S. Defined Benefit Pension Plan 2
IRA	Individual Retirement Account	USDB Pension Plan 3	U.S. Defined Benefit Pension Plan 3
Life and AD/D	Life Insurance - Accidental Death or Dismemberment Insurance	USDB Pension Plan 4	U.S. Defined Benefit Pension Plan 4
Life	Life Insurance	USDB Pension Plan 5	U.S. Defined Benefit Pension Plan 5
Long-term Disability	Long-term Disability Insurance	USDB Pension Plan 6	U.S. Defined Benefit Pension Plan 6
Major Medical	Major Medical	U.S. Savings Bonds	U.S. Savings Bonds
Medical	Medical	Vacation	Vacation Leave
NQ Dental	Non-Qualified Dental Insurance	Vacation Buy	Vacation Leave Buy
NQ Vision	Non-Qualified Vision Insurance	Vacation Sell	Vacation Leave Sell
Nonelective Contrib	Non-elective contributions to a retirement savings or pension plan.	Visn/Hear	Vision and Hearing Insurance

<i>Plan Type</i>	<i>Description</i>	<i>Plan Type</i>	<i>Description</i>
FEGLI Living Ben	Federal Employees Group Life Insurance Living Benefit	Option A Standard	Option A - Standard Option in the FEGLI program
403(b)	Type of U.S. retirement savings program.	Retirement TSP 1 %	U.S. government retirement plan called Thrifts Savings Plan, for which agency contribution is one percent.
Employer Only	Retirement savings program contributions, which are employers only.	None	

## WA Compensation Code

### Benefit Plan

The Benefit Plan column includes those deductions with a plan type other than 00 in the HRMS system, such as *Medical*. Prompt values are from the WA\_PLAN\_TYP\_VW table. Ten HRMS source tables contain data that is used to track benefits enrollment and migration status.

---

**Note:** If both vacation buy and sell values are to be analyzed, you must define them separately.

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### Deduction Code

The Deduction Code column includes those deductions with a plan type of 00 in the HRMS system, such as *Parking Reimbursements* and *Charitable Contributions*. Prompt values are from the %EDITTABLE table.

### Coverage Code

A coverage code appears when you open the page for a plan type of 10 (*Health Benefit, such as Medical*). Examples of coverage codes are *Employee Only*, *Employee & Spouse*, *Employee & Dependents*, and *Family*. Prompt values are from the WA\_COVG\_CD\_R00 table. Tracking coverage codes in EPM serves two purposes:

- You can track health benefit enrollment migration at a lower level than the plan type. For example, instead of using only one compensation code for all coverage levels of medical insurance, you could have several lower-level compensation codes for different coverage levels of medical insurance, all of which roll up to a single parent compensation code for the generic category called medical insurance.
- You can store health benefits-related compensation data in the WA\_COMP\_HST\_F00 table, using the mappings in the WA\_BEN\_VALU\_TBL table, more accurately. This is possible because you are allowing for different coverage costs for the different coverage levels, rather than accepting just one default cost value for all coverage levels.

---

**Note:** Any new compensation codes that you create to accommodate multiple coverage codes per a single plan type must be added to the COMPCODE\_D00 table and to the COMPCODE tree.

---

### Compensation Code

Compensation Code is a required field in the sense that all of the benefit plans and deductions that you want to include in your data warehouse tables must be mapped to a compensation code, which must correspond to a code on the Compensation tree.

Prompt values are from the WA\_COMP\_ACCT\_VW table. You need only bring data into the data warehouse tables that supports your planned analyses. Any deduction code or benefits plan type that is not mapped using this page should not be brought into the data warehouse tables. Mappings entered in this page are stored in the WA\_COMP\_DED\_MAP table.

### Amount Type

Select an amount type from the list of translate table values.

Valid values are *Employee Expense*, *Employee Val* (Employee Value), and *Employer Exp* (Employer Expense). This indicates whether the monetary value of the deduction or benefit is an expense or value to the employee or the employer. This is only the default value for the compensation code and is overridden if the deduction class on the pay deduction row from HRMS indicates that it is either an employer expense or employee expense. It is also overridden if a row is set up on the Workforce Analytics WA\_BEN\_VALUE\_TBL table for this compensation code. The system uses the amount type to determine employee and employer compensation costs, especially in Workforce Rewards.

### Related Links

[Mapping Compensation Codes and Plan Values](#)

## Compensation Earnings Map Page

Use the Compensation Earnings Map page (WA\_COMP\_ERN\_MAP) to map earnings codes from the HRMS system to compensation codes in EPM.

Mappings are stored in the WA\_COMP\_EARN\_MAP table.

## Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Compensation, Compensation Earnings Map

### Image: Compensation Earnings Map setup page

This example illustrates the fields and controls on the Compensation Earnings Map setup page. You can find definitions for the fields and controls later on this page.

**Maintain Dimension**

SetID: SHARE      Earnings Code: ALL      Allocated Tips

Compensation Code From HRMS      Find | View All    First 1 of 1    Last

\*Effective Date: 01/01/1980      Status: Active

\*Description: Allocated Tips

WA Compensation Code      Customize | Find | First 1 of 1    Last

	*Compensation Code	Description	*Amount Type	Description	
1	400	Cash Compensation	4	Employee Val and Employer Exp	+ -

## Earnings Code

When you access the page, you are prompted to specify an earnings code. *Earnings* are those values from the ERNCD field on the PS\_EARNINGS and PS\_PAY\_OTHER\_EARNS tables from HRMS.

## WA Compensation Code

### Compensation Code

Compensation Code is a required field in the sense that all earnings you want to include in your data warehouse tables must be mapped to a compensation code, which must correspond to a code on the Compensation tree. Prompt values are from the WA\_COMP\_ACCT\_VW table. You need only bring data into the data warehouse tables that supports your planned analyses. Any earnings code that is not mapped using this page is not brought into the data warehouse tables. Mappings entered in this page are stored in the WA\_COMP\_ERN\_MAP table.

### Amount Type

Select an amount type from the list of translate table values.

Valid values are *Employee Expense*, *Employee Val* (Employee Value), and *Employer Exp* (Employer Expense). This indicates whether the monetary value of the earnings is an expense or value to either the employee or the employer. The system uses the amount type to determine employee and employer compensation costs, especially in Workforce Rewards.

## Compensation GP Pin Map Page

Use the Compensation GP Pin Map page (WA\_COMP\_PIN\_MAP) to map PIN (pay item name) codes from PeopleSoft Global Payroll to compensation codes in the EPM.

Mappings are stored in the WA\_COMP\_PIN\_MAP table.

### Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Compensation, Compensation GP Pin Map

### Image: Compensation GP Pin Map setup page

This example illustrates the fields and controls on the Compensation GP Pin Map setup page. You can find definitions for the fields and controls later on this page.

Maintain Dimension					
SetID: SHARE		Element Type: DD			
Pin Code from HRMS					
*Effective Date: 01/01/1900		Status: [ ]			
*Description: Tax1					
WA Pin Code					
*PIN Number	Description	*Compensation Code	Description	*Amount Type	Description
1	2133	DD		4	Employee Val and Employer Exp
2	2152	580	Company Car	4	Employee Val and Employer Exp

## Pay Element Types

### Element Type

When you access the page, you are prompted to specify a pay element type. *Pay Elements* are from the PeopleSoft Global Payroll system GP\_PIN table. This is the main record in that application for setting up elements such as earnings, deduction, absence taken, and so forth.

## WA PIN Code

### PIN Number

Enter a PIN number (pay item name code or number). The system displays the related pay item name. This field corresponds to the PeopleSoft Global Payroll field PIN\_NUM for pay items within pay element types. For example, pay elements such as earnings might include pay items such as salary plans, sick plans, and so forth.

### Compensation Code

Compensation Code is a required field in the sense that all PIN codes that you want to include in your data warehouse tables must be mapped to a compensation code, which must correspond to a code on the Compensation tree. Prompt values are from the WA\_COMP\_ACCT\_VW table. You need only

bring data into the data warehouse tables that supports your planned analyses. Any PIN code that is not mapped using this page is not brought into the data warehouse tables. Mappings entered in this page are stored in the WA\_COMP\_PIN\_MAP table.

**Amount Type**

Select an amount type from the list of translate table values. Valid values are *Employee Expense*, *Employee Val* (Employee Value), and *Employer Exp* (Employer Expense). This indicates whether the monetary value of the earnings is an expense or value to either the employee or the employer. The system uses the amount type to determine employee and employer compensation costs, especially in Workforce Rewards.

**Benefits Valuation Map Page**

Use the Benefits Valuation Map page (WA\_BEN\_VALU\_TBL) to assign a monetary amount to a benefit to distinguish whether the amount is an employee cost, employee value, or employer's cost.

The benefits amounts and values that you enter using this page are stored on the WA\_BEN\_VALUE\_TBL table. Use this page for compensation codes that you have already set up in the COMPCODE tree and mapped in the Comp Deduction Code Map (HR) page.

**Navigation**

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Benefits, Benefits Valuation Map

**Image: Benefits Valuation Map setup page**

This example illustrates the fields and controls on the Benefits Valuation Map setup page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web-based form titled "Maintain Dimension" for a dimension named "Vision". At the top, it displays "SetID: SHARE", "Compensation Code: 552", and "Vision". Below this is a "Details" section with a search bar and navigation controls. The form contains several input fields and dropdown menus:

- Effective Date:** 07/16/2001
- Status as of Effective Date:** A dropdown menu.
- \*Description:** Vision Plan
- \*Amount Type:** Employee Value
- Currency Code:** USD
- Annual Rate:** 263.00
- Percent of Salary:** 0.00

---

**Warning!** Whenever you enter data in this page, ensure that you aren't creating redundant data. Use this page only to provide a valuation of benefits plans that don't otherwise have an amount and value associated with them in HRMS. That is, use it for a given compensation code when that information is not available through payroll data, or when your source data does not provide the amounts and values that your company wants to track. Do not use this table for expenses, or for duplicating information that is available from payroll data.

---

<b>Amount Type</b>	Select an amount type from the list of translate table values. Valid values are <i>Employee Expense</i> , <i>Employee Val</i> (Employee Value), and <i>Employer Exp</i> (Employer Expense).
<b>Currency Code</b>	Use the prompt list values in the Currency Code field to indicate the currency for the benefit value amount. Prompt values are from the currency code table (CURRENCY_CD_TBL).
<b>Annual Rate and Percent of Salary</b>	Enter an amount for the benefit value, either as the annual rate or the annual percent of salary.  These mappings are stored in the WA_BEN_VALU_TBL table.

## Loading Compensation Data

Use the ETL process to load compensation data from the OWS staging tables to the data warehouse tables. Here is a summary of what happens when you load compensation data:

<b>Compensation Type</b>	<b>Mapping Tables Referenced</b>	<b>Target Data Warehouse Tables</b>
Deductions	WA_COMP_DED_MAP. Any deductions not mapped are not loaded.	WA_COMP_HST_F00 with rows of employee-level compensation cost and value data.
Benefits	WA_COMP_DED_MAP and WA_BEN_VALU_TBL tables. Any benefit plans not mapped are not loaded.	<p>WA_COMP_HST_F00 with rows of employee-level compensation cost and value data, as annualized costs.</p> <p>WA_BEN_HST_F00 with benefits enrollment data.</p> <p><i>Note.</i> If, while loading WA_COMP_HST_F00, the system finds an enrollment row for an employee on one of the enrollment tables (Health Benefit, Life Add Benefit, Disability Benefit, FSA, Savings, and so on), then the system looks to the WA_BEN_VALU_TBL table for a corresponding compensation code. If a row exists for mapping that benefit to a compensation code on the WA_BEN_VALU_TBL table, then the mapped values associated with that benefit are inserted for that employee on WA_COMP_HST_F00, with a compensation source of <i>B</i>.</p>

<b>Compensation Type</b>	<b>Mapping Tables Referenced</b>	<b>Target Data Warehouse Tables</b>
Earnings	WA_COMP_ERN_MAP. Any earnings not mapped are not loaded.	WA_COMP_HST_F00 with rows of employee-level compensation cost and value data.
Pay Item Names	WA_COMP_PIN_MAP. Any pay items not mapped are not loaded.	WA_COMP_HST_F00 with rows of employee-level compensation cost and value data.

## Loading OWE Tables

This section provides an overview of the data warehouse tables of primary concern to workforce analytic applications and discusses how to:

- Load competency data.
- Load staffing data.
- Load job data.
- Load employee compensation history data.

## Understanding OWE Tables

You use the ETL process to load internal source data from the OWS staging tables into your OWE tables. The following table provides a brief overview of the OWE tables loaded by the ETL process that are of primary concern to workforce analytic applications. Important points about some of the fact (\*\_F00) tables are presented both in this table and in this section following the table. Important points about some of the dimension (\*\_D00) and reference (\*\_R00) tables are discussed in the next section after that.

This table is not a comprehensive list of all of the data warehouse tables in the OWE.

See My Oracle Support for the most complete, up-to-date documentation of the data warehouse tables. Where a discrepancy exists, the report delivered on My Oracle Support takes precedence.

See My Oracle Support for suggested table loading sequences.

After you've completed the ETL process, you must run the Currency Conversion job if, and only if, the data that you imported with ETL contains currency amounts, which require standardization into a base currency equivalent. Currency Conversion must be run as a standalone job within a jobstream.

<b>OWE Table Name</b>	<b>Source Tables</b>	<b>Usage within Workforce Analytics</b>
ACCOMP_D00	ACCOMP_TBL	Workforce Planning
BENEF_PLAN_TBL	BENF_PLAN_TBL	Workforce Rewards
COMPANY_D00	COMPANY_TBL	Workforce Planning
COMPETENCY_D00	COMPETENCY_TBL	Workforce Planning



<b><i>OWE Table Name</i></b>	<b><i>Source Tables</i></b>	<b><i>Usage within Workforce Analytics</i></b>
DEDUCTION_TBL	DEDUCTION_TBL	Workforce Rewards
DEPARTMENT_TBL	DEPT_TBL	Workforce Rewards Workforce Planning
EARNINGS_TBL	EARNINGS_TBL	Workforce Rewards
EMPL_REVW_F00	EP_APPR EP_APPR_ROLE	Workforce Rewards
JOB_F00	JOB	Workforce Rewards Workforce Planning
JOB_INTRADY_F00	JOB GVT_JOB PER_ORG_ASGN	Workforce Rewards
JOBCD_TRNPR_D00	JOBCD_TRN_PROG	Workforce Rewards
JOBCODE_D00	JOBCODE_TBL	Workforce Rewards Workforce Planning
LOCATION_D00	LOCATION_TBL	Workforce Rewards Workforce Planning
MAJOR_TBL	MAJOR_TBL	Workforce Planning
PERSONAL_D00	PERS_DATA_EFFDT NAMES PERSON	Workforce Planning
POSITION_DATA	POSITION_DATA	Workforce Rewards
SAL_GRADE_D00	SAL_GRADE_TBL	Workforce Rewards
SAL_MTRXTBL_D00	SAL_MATRIX_TBL	Workforce Rewards
SAL_PLAN_R00	SAL_PLAN_TBL	Workforce Rewards
SAL_RATECD_D00	SAL_RATECD_TBL	Workforce Rewards
SAL_STEP_D00	SAL_STEP_TBL	Workforce Rewards
SCHOOL_D00	SCHOOL_TBL	Workforce Planning
SCHOOL_TYPE_D00	SCHOOL_TYPE_TBL	Workforce Planning

<b><i>OWE Table Name</i></b>	<b><i>Source Tables</i></b>	<b><i>Usage within Workforce Analytics</i></b>
STAFFING_F00	HRS_JOB_OPENING HRS_JO_RQMT	Workforce Rewards
VC_PLAN_D00	VC_PLAN_TBL	Workforce Rewards
WA_ACMPHISH_F00	ACCOMPLISHMENTS	Workforce Planning
WA_COMP_HST_F00	<ul style="list-style-type: none"> <li>• GP_RSLT_ERN_DED</li> <li>• GP_PYE_PRC_STAT</li> <li>• PAY_EARNINGS</li> <li>• PAY_OTH_EARNS</li> <li>• PAY_CHECK</li> <li>• PAY_DEDUCTION</li> <li>• TOTAL_DED</li> <li>• HEALTH_BENEFIT</li> <li>• LIFE_ADD_BEN</li> <li>• DISABILITY_BEN</li> <li>• FSA_BENEFIT</li> <li>• SAVINGS_PLAN</li> <li>• VACATION_BEN</li> <li>• LEAVE_PLAN</li> <li>• CAR_PLAN</li> <li>• RTRMNT_PLAN</li> <li>• PENSION_PLAN</li> </ul>	Workforce Rewards
WA_COMPTNCY_F00	<ul style="list-style-type: none"> <li>• CM_EVALUATIONS</li> <li>• COMPETENCIES</li> <li>• EP_APPR</li> <li>• EP_APPR_ITEM</li> </ul>	Workforce Planning
WA_COVG_CD_R00	COVRG_CD_TBL	Workforce Rewards
WA_REVWRTG_R00	RE VW_RATING_TBL	Workforce Rewards Workforce Planning
WA_ROLE_D00	CM_ROLE	Workforce Planning

<b>OWE Table Name</b>	<b>Source Tables</b>	<b>Usage within Workforce Analytics</b>
WA_ROLEACMP_D00	CM_ROLE CM_ROLE_ACCOMPS	Workforce Planning
WA_RTGMDL_R00	RATING_MDL_TBL	Workforce Rewards Workforce Planning
WA_TASK_D00	CM_ROLE	Workforce Planning
WA_TASKCMPT_D00	CM_ROLE_ACCOMPS	Workforce Planning

**Note:** Only some, not all, of the fields in the HRMS tables are used in the data warehouse tables. If an apparent discrepancy exists between the information on the previous chart and on My Oracle Support, the information in My Oracle Support takes precedence.

## Loading Competency Data

The WA\_CMPTN\_EE\_F00 table records employee-level competency data, and it is used in HCM Warehouse and Workforce Scorecard. In this table, the competency source field (WA\_CMSOURCE) identifies the source of the competency data for an employee. The field is populated during data loading. The sources are the HRMS modules that use competencies: Plan Careers, Manage Competencies, and Performance Management. Valid values are *Career Strength*, *Career Weakness*, *Competencies*, *NVQ Units Progression*, and *Performance Management*.

The WA\_CMPTNCY\_F00 table records competency ratings for each employee, applicant, or contractor evaluation, and it is used in Workforce Planning. The sources are the HRMS modules: Manage Competencies and Performance Management (employee appraisals). Only the official, approved rating from the employee review is selected.

This list shows the main competency-related dimension tables and fact data warehouse tables used by Workforce Planning:

- WA\_CMPTNCY\_F00
- WA\_ACPLISH\_F00
- WA\_ACMP\_MAJ\_F00
- WA\_TASK\_D00
- WA\_TASKCMPT\_D00
- WA\_TASK\_ACMP\_D00
- WA\_ROLE\_D00
- WA\_ROLECMPT\_D00
- WA\_ROLEACMP\_D00
- WA\_ROLE\_TASK\_D00

## Loading Staffing Data

During data loading, the system imports data for the Staffing table (STAFFING\_F00) from two HRMS tables. When the data comes from the JOB\_REQUISITION table, the value for the EPM field REQ\_NEW\_POS is copied over directly as *Y* (yes) or *N* (no). When the data is imported from the POSITION\_DATA table, the EPM field REQ\_NEW\_POS value is derived using the following mapping logic:

If the HRMS table POSITION\_DATA.ACTION\_REASON field value is *NEW*, then the value for the EPM field REQ\_NEW\_POS is set to *Y*. Otherwise, the value for REQ\_NEW\_POS is set to *N*.

## Loading Job Data

Before you use ETL to load the OWE table JOB\_F00, you must have completed setup of online pages for the following tables:

- CURRENCY\_CD\_TBL
- FREQUENCY\_TBL
- SETID\_TBL
- WA\_LOCN\_MAP\_DFN
- WA\_ACTN\_RSN\_DFN
- BUS\_UNIT\_TBL\_PF
- BUS\_UNIT\_SRC\_PF

During data loading, the system creates an additional row in JOB\_F00 for employees who have a more recent row in JOB\_F00 with another business unit to indicate that the employee is no longer active for the first business unit. For example, assume that the system imports two rows of data for an employee with the following business units, effective dates, and effective statuses:

```
CORP1, 1/1999, Active
```

```
CORP2, 2/2000, Active
```

Then the system will insert a third row of data into JOB\_F00 to indicate that the employee is no longer active for the first business unit:

```
CORP1, 2/2000, Inactive
```

## Setting the WA\_VOLUNTARY\_FLAG Field

The ACTION, ACTION\_REASON, and WA\_VOLUNTARY\_FLAG fields are in the JOB\_F00 table. WA\_VOLUNTARY\_FLAG is a Workforce Analytics field that you map online prior to data loading. The mapping identifies whether each action and reason combination imported from HRMS results in a voluntary action, involuntary action, or no action.

## Importing Effective-Sequenced Job Actions

During data loading, the system imports the maximum effective sequence row for each effective date from the HRMS Job Data table and places that row in JOB\_F00. In contrast, the system loads all effective-sequenced rows from the HRMS Job Data table into JOB\_INTRADY\_F00.

## Importing Review Rating Data to JOB\_F00

Normally during data loading, the system populates the EPM review rating field (JOB\_F00.REVIEW\_RATING) with HRMS data. When data is imported into the JOB\_F00 table from the HRMS Job Data table, the loading process verifies that only valid values are supplied for REVIEW\_RATING by comparing them with values in the lookup table WA\_REVWRTG\_R00. If a corresponding value isn't on the WA\_REVWRTG\_R00 table, then some rows of data that you might expect to see for that employee may not be imported. You must verify that all values for a given REVIEW\_RATING have a corresponding row on WA\_REVWRTG\_R00.

## Streamlining JOB\_F00 and Row-Level Security

If your implementation includes row-level security at the employee level, based on JOB\_F00 and PERSONAL\_D00, then load the JOB\_F00 and PERSONAL\_D00 tables before setting up security.

## Loading Employee Compensation History Data

The EPM compensation code field (WA\_COMPCODE) on the Compensation Code table (COMPCODE\_D00) categorizes types of compensation. These codes are used to relate compensation to nodes on the COMPCODE tree. Prior to data loading earnings, deductions, benefits plans, and pay item types from HRMS tables are mapped to these compensation codes using online pages. During data loading, employee compensation history is imported into the employee Compensation History table (WA\_COMP\_HST\_F00).

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## Viewing and Editing Data in Dimension and Reference Tables

To view and edit data in workforce-related dimension and reference tables, use the GEOGRAPHY\_D00.GBL, WA\_JOB\_CDSET\_D00.GBL, WA\_UNITCODE\_D00.GBL, WA\_INDUSTRY\_D00.GBL, WA\_FINCODE\_D00.GBL, and COMPCODE\_D00.GBL components.

This section provides an overview of the review and edit of dimension and reference data and discusses how to:

- View and edit departments.
- Set up geography IDs.
- View and edit job codes and job code sets.
- View and edit personal information.
- View and edit position data.
- View and edit location data.
- View and edit salary grades and steps.
- Set up compensation codes.
- Set up industry codes.
- Set up financial codes.

- Set up unit codes.
- Define age, service, and other duration groups.

## Pages Used to View and Edit Data in Dimension and Reference Tables

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Department	DEPARTMENT_TBL	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, Common, Department	View and edit departments, which can be used for financial related accounting purposes or to provide an organizational hierarchy for your company.
Geography	GEOGRAPHY_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, Common, Geography	Create geography identification codes, which are geographical regions, which your locations roll up to.
Job Code	JOBCODE_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Employee and Job, Job Code	View and edit data in JOBCODE_D00, and provide the details for the JOBCODE tree.
Job Code Set	WA_JOBCDSET_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Employee and Job, Job Code Set	Create the nodes that define the structure of your JOBCODE tree. You must enter this information for each node using this page. A job code set is a collection of related job codes.
Job Earnings Distribution	JOB_EARNDST_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Employee and Job, Job Earnings Distribution	View and edit how to post an employee's earnings for accounting purposes. For example, earnings can be posted to a job code, a department, a location, a general ledger account, a position, or distributed among several categories.
Job Tasks	JOB_TASK_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Employee and Job, Job Tasks	View and edit job codes for which sets of job tasks are available.
Personal Data	PERSONAL_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Employee and Job, Personal Data	View and edit personal information about your employees in the PERSONAL_D00 table. Rows from the HRMS tables PS_PERSONAL_DATA, PS_EMPLOYMENT and PS_EMPLOYEES are intended to be brought in to the PERSONAL_D00 table with ETL.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Dependent Data	WA_DEP_BEN_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Benefits, Dependent Data	View and edit information about dependents and beneficiaries.
Position	POSITION_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Employee and Job, Position	View and edit position data if Position Management is implemented in the source HRMS system.
Salary Grade Data	WA_SAL_GRADE_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Salary, Grade	View and edit a salary grade structure for your salary administration plan.
Salary Increase Matrix	SAL_MTRXTBL_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Salary, Increase Matrix	View and edit the identifier for each set of salary increase guidelines, the name of the matrix, and what rating scale is used for the ranges.
Salary Matrix Percent	SAL_MTRXPCT_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Salary, Matrix Percent	View and edit the acceptable percentage ranges for salary increases.
Salary Rate Code	SAL_RATECD_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Salary, Rate Code	View and edit compensation rate code information.
Variable Comp Plan (variable compensation plan)	VC_PLAN_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Compensation, Variable Comp Plan	View and edit data for a variable compensation plan that is not likely to change over the life of the plan.
Stock Plan	STOCK_PLAN_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Benefits, Stock Plan	View and edit stock plan and type information.
Training History	WA_TRN_HST_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Training, Training History	View and edit employee training history along with related course cost information.
Training Session	WA_TRNSESSION_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Training, Training Session	View and edit training session expenses.
Training Course 1	COURSE_1_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Training, Courses	View and edit training course information.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Training Course 2	COURSE_2_D00	Select the Course 2 tab	View and edit additional training course details.
Course Session	CRSE_SESSION_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Training, Course Session	View and edit session information for training courses.
Training Program Job Code	JOBCD_TRNPR_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Training, Training Program Job Codes	View and edit information about training program assignments for jobs in your organization.
Course Goal Competency	COURSE_COMP_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Training, Course Goal-Competency	View and edit the competencies, and their associated proficiency levels, that are associated with a particular training course.
Account Codes	ACCT_CD_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Account Codes	View and edit the account code information from general ledger and payroll.
Compensation Code	COMPCODE_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Compensation, Compensation Code	Create nodes for the COMPCODE tree. Also, use this page to view and edit compensation code data after you have run ETLs to import compensation data from your HRMS system.
Coverage Code	WA_COVG_CD_R00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Benefits, Coverage Code	View and edit benefits coverage codes.
Financial Code	WA_FINCODE_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Financial Code	Create the nodes for the FINCODE tree.
Industry Code	WA_INDUSTRY_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Industry Code	Create the nodes for the INDUSTRY tree.
Unit Code	WA_UNITCODE_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Unit Code	Create the nodes for the UNITCODE tree.
School Codes	SCHOOL_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Competencies, School	View and edit codes to schools, colleges, and universities.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
School Type	SCHOOL_TYPE_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Competencies, School Type	View and edit codes for school types.
Accomplishments	ACCOMP_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Competencies, Accomplishments	View and edit the accomplishments that your employees, applicants, or contractors may achieve. Accomplishments are languages, degrees, licenses, certificates, honors, awards, professional memberships, tests, or NVQs (National Vocational Qualifications).
Review Rating	WA_REVWRTG_R00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Salary, Review Rating	View and edit rating models, consisting of review ratings.
Competencies	COMPETENCY_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Competencies, Competencies	View and edit competencies organized by the following general categories: ability, knowledge, skill, salary planning, and NVQ unit.
Competency Type	CM_TYPE_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Competencies, Competency Types	View and edit codes for competency types.
Competency Cluster	CM_CLUSTER_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Competencies, Competency Cluster	View and edit codes for competency clusters.
Vacation Plan	ABSV_PLAN_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Vacations/Absences, Vacation Plan	View and edit information about vacation benefit plans—including the accrual frequency, maximum balance and maximum carryover—for employees in various groups.
Absence Code	ABS_CODE_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Vacations/Absences, Absence Code	View and edit absence codes for your absence types.
Absence Type	ABS_TYPE_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Vacations/Absences, Absence Type	View and edit the type of absences employees can take.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Absence Class	ABS_CLASS_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Vacations/Absences, Absence Class	View and edit the codes for absence classes.
Health and Safety Data	WA_INJ_ILL_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Employee and Job, Health and Safety Data	View and edit employees' health and safety incident data.
Applicant Disability	APP_DIS_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Applicants, Applicant Disability	View and edit information on an applicant's disability.
Disability	DISABILITY_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Employee and Job, Disability	View and edit information about an employee's disability.
Department Budget Earn Dist (department budget earnings distribution)	DEPT_BUDERN_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Compensation, Department Budget Earn Dist	View and edit the earnings distributions to accounts for each of the specified department budget levels.
Duration Group Definition	WA_DUR_GRP_DFN	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Common, Duration Group Definition	Define duration groups based upon time duration (such as age, service, job, grade, and so on) which can be used in analysis templates.

## Understanding Review and Edit of Dimension and Reference Data

You can view and edit the data in certain data warehouse dimension and reference tables at any time using the pages in the OW-E Dimension Maintenance, HRMS menu. The main point to remember about these pages is that their intended purpose is for you to monitor and perform slight edits on the data in the data warehouse tables. Do not use them in the traditional, transactional sense to manually add rows of data to the system. Many of the edits and checks that are built into the HRMS system to ensure data integrity are not present in the data warehouse tables. This means that you could create data that would not be valid in the source system. The vast majority of the data in your data warehouse tables should be imported using ETL.

Several dozen dimension and reference table access pages are in the OW-E Dimension Maintenance, HRMS menu. The fields on these pages and in the underlying tables are mostly a mirror representation of, or a selection of, those in the HRMS system. The pages themselves are fairly simple setup pages. For these reasons, this topic does not address these pages in any great detail, except to make note of any important differences in how they are applied in Workforce Analytics.

## Viewing and Editing Departments

Load HRMS departments into the Department table (DEPARTMENT\_TBL). Use them to create a financial-related Department tree to provide a hierarchy for departmental accounts. Also use the same departments to create an Organization (Department) tree to provide a hierarchy for all departments in your organization. A secondary purpose of the Organization tree is to create row-level group security.

### Related Links

[Setting Up the Organization \(Department\) Tree](#)

## Setting Up Geography IDs

The Geography dimension in Workforce Analytics helps provide a hierarchical structure to your organization's locations, using the Geography tree. Prior to loading locations from HRMS, use the Geography page (GEOGRAPHY\_D00) to create geographical regions, which logically group together locations in your organization. Map locations to the geographical regions using the Location Mapping page (WA\_LOCN\_MAP\_DFN).

### Related Links

[Mapping Locations to Geography ID Codes](#)

[Viewing and Editing Data in Dimension and Reference Tables](#)

## Viewing and Editing Job Codes and Job Code Sets

The job code dimension in Workforce Analytics uses the Job Code tree to provide a hierarchical structure to your organization's jobs. Job code sets are the nodes of the tree. They are logical groupings of job codes that you create using the Job Code Set page (WA\_JOBSET\_D00). Job codes provide the details of the tree. Load job codes into the Job Code table (JOB\_CODE\_D00), prior to building the tree.

### Compensation Values Associated with Job Codes

If you are using an external market compensation survey to compare your organization's salaries with industry averages, the salary midpoint for the equivalent job code goes in the Survey Salary field. These are usually annualized values.

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**Note:** When you import market compensation survey data into the Operational Warehouse (OW), the data-loading process annualizes the compensation values. All salary survey data that is processed in the Define Market Compensation module of Workforce Rewards is standardized to annual values.

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### Related Links

[Setting Up the JOB\\_CODE Tree](#)

## Viewing and Editing Personal Information

When you have loaded personal data from HRMS into the PERSONAL\_D00 table, you can use the pages in the Personal Data component to view and edit the information.

## Running Application Engine PER099 Prior to Importing Personal Data

Remember that the PS\_EMPLOYEES table is used in HRMS to improve the efficiency of report processing. The table is not updated dynamically by the HRMS system; you must run the Application Engine process PER099 (Refresh Employees Table) to update the PS\_EMPLOYEES table. To ensure that you are loading the most up-to-date information into the EPM tables, run the Application Engine process PER099 immediately prior to importing personal data into the OWS staging tables.

## Clarifying Row-level Security Issues About Personal Data

The PERSONAL\_D00 and JOB\_F00 tables are intended to be populated with data using the delivered ETL process. If you enter new rows of employee data manually using the Personal Data page, and group security is in effect based on JOB\_D00\_VW (which is a view of JOB\_F00) then you may not see this data displayed on pages having row-level security based on employees. Two additional steps are required to view the data. You must first add a corresponding row of data to JOB\_F00, and then you must rerun the PF\_SECURITY process for security to be enabled.

If, after you use the data migration process to load data into PERSONAL\_D00, the data does not appear in the online pages such as Personal Data, then the problem may have to do with implementation of group (row-level) security based on employees. The search record for PERSONAL\_D00 is PERSONAL\_SRCH. PERSONAL\_SRCH is a join of PERSONAL\_D00 and PF\_SY\_CLASS\_OBJ. PF\_SY\_CLASS\_OBJ is populated by running the PF\_SECURITY process. If, in your implementation, row-level security is enabled at the employee level, then the security groups are likely built referencing JOB\_F00 (or a view of JOB\_F00). Both JOB\_F00 and PERSONAL\_D00 must be populated with corresponding rows of data, and then the PF\_SECURITY process must be run, before the data appears online.

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**Note:** If your implementation includes row-level security at the employee level, based on JOB\_F00 and PERSONAL\_D00, then load the JOB\_F00 and PERSONAL\_D00 tables before setting up security.

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## Importing Personal Names

During data migration, the system populates the Personal Name field in the PERSONAL\_D00 table with the data from the Name field in the HRMS Personal Data table. You can view and edit this data using the Personal Data component. During data loading, the system populates the Personal Name field with the name of the individual from the HRMS Names table.

The Last Name, First Name, and Middle Name fields separate the person's personal name into its components. These fields are also populated by HRMS source fields during data loading.

The Last Name Search and First Name Search fields are populated from the HRMS source fields during data loading. These are versions of the names that have no punctuation (for example, apostrophes are removed) and are in all capital letters. These versions of the names are used by the HRMS system as search values.

## Viewing and Editing Position Data

The POSITION\_D00 page and underlying table are provided for those sites that use the Position Management feature of HRMS. Use of this page and table is not necessary if Position Management is not used at your site.

The position dimension in Workforce Analytics uses the Position tree to provide a hierarchical structure for positions within an organization. Position data is loaded into the Position table (POSITION\_D00).

Position data and job requisition data are aggregated into a single structure, centering on the Staffing table (STAFFING\_F00).

### Related Links

[Setting Up the Position Tree](#)

## Viewing and Editing Location Data

You import locations into the Location table, and map them to geography IDs. The geography dimension uses the GEOGRAPHY tree to provide a hierarchical structure to your locations and geographical regions.

During initial setup, first determine what geographical regions you want to map your HRMS locations to. Enter the geography IDs for those regions using the Geography page. Create a GEOGRAPHY tree using these geography IDs. Then map your locations to the geography IDs using the Location Mapping (WA\_LOCN\_MAP\_DFN) page. If you have done all of this correctly, then during the ETL process, for each location imported to the LOCATION\_D00 table, the value from the WA\_LOCN\_MAP\_DFN.GEOGRAPHY\_ID field is used to populate the LOCATION\_D00.GEOGRAPHY.ID field.

### Related Links

[Mapping Locations to Geography ID Codes](#)

[Setting Up the Geography Tree](#)

## Viewing and Editing Salary Grades and Steps

After you have loaded the salary administration plan, salary grade, and salary step information from HRMS into the data warehouse tables, you can use the Salary Grades component to view and edit the grades and steps that make up salary administration plans.

### Understanding Salary Value Calculations

After you have imported salary data, you can review the data and correct it manually using these pages. When you change a value using one of the online pages, the EPM system does not recalculate any of the other related numbers automatically.

Remember that in the HRMS system, the salary terms are defined in the following way:

<b>Monthly</b>	The annual rate divided by the pay months per year.
<b>Hourly</b>	The monthly rate prorated to 12 pay periods, divided by 52 weeks in the year, divided by 40 hours per week.
<b>Midpoint</b>	The maximum plus the minimum divided by two.

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**Note:** In the Workforce Rewards Define Base Pay Structure module, the system defines and calculates midpoints as the maximum plus the minimum divided by two. In your implementation of HRMS, you may have chosen to define compensation midpoints differently. If this is the case, then keep this difference in mind when comparing compensation midpoints from your imported data with compensation midpoints created using Workforce Rewards.

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## Setting Up Compensation Codes

The compensation dimension in Workforce Analytics uses the Compensation Code tree to provide a hierarchical structure to the earnings, deductions, benefits values, and PIN codes loaded from the HRMS system.

You create compensation codes using the Compensation Code page (COMPCODE\_D00). Then you map the earnings, deductions, benefits values, and PIN codes from HRMS to these compensation codes using a series of mapping pages.

### Compensation Classes

Compensation classes are from the translate table. The valid values correspond to the delivered nodes on the model COMPCODE tree.

### Account Field

The account field is used for tracking financial data. Prompt values are from the GL\_ACCOUNT\_TBL table. You load values for the GL\_ACCOUNT\_TBL table while setting up basic EPM infrastructure and EPM Foundation. This information can be found in the *Enterprise Performance Management Fundamentals*.

### Related Links

[Mapping Compensation Codes and Plan Values](#)

[Setting Up the Compensation Code Tree](#)

## Setting Up Industry Codes

The industry code dimension is used primarily in the Workforce Rewards Market Compensation module to deal with loading external survey data. You use the Industry Dimension page to enter industry codes that define the industry that an organization is in. These codes categorize data from external survey sources and validate comparison to data for your organization. Industry codes are the nodes on the Industry tree.

### Related Links

[Setting Up the INDUSTRY Tree](#)

## Setting Up Financial Codes

The financial code dimension is used primarily in the Workforce Rewards Market Compensation module to deal with loading external survey data. You use the FinCode Dimension page to enter financial codes that define the relative financial size of your organization. These codes categorize data from external survey sources and validate comparison to data for your organization. Financial codes are the nodes on the FINCODE tree.

The From Value and To Value fields indicate the value range for the approximate size of an organization's financial worth.

### Related Links

[Setting Up the FINCODE Tree](#)

## Setting Up Unit Codes

The unit code dimension is used primarily in the Workforce Rewards Market Compensation module to deal with loading external survey data. You use the Unit Code page to enter unit codes that define the relative size of an organization (using an alternate criteria other than a financial one). These codes categorize data from external survey sources and validate comparison to data for your organization. Unit codes are the nodes on the UNITCODE tree.

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**Note:** The purpose of the unit code dimension is to provide an alternate means of measuring the relative size of companies participating in external surveys, as opposed to using the relative financial size of the companies. A typical unit of measure would be the number of employees in a company. The concept of unit is generic enough that the units can be other measures besides number of employees. For example, in the hospital industry the unit could be the number of hospital beds. Or in the hotel industry the unit could be the number of rooms.

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The From Value and To Value fields indicate the value range for the approximate size of an organization based on this unit of measure.

### Related Links

[Setting Up the UNITCODE Tree](#)

## Defining Age, Service, and Other Duration Groups

Because durations are not part of the HRMS system, you can define them online using the Duration Group page to provide time dimension for analysis templates (WA\_DUR\_GRP\_DFN).

You can define duration groups based on age, department, grade, job, pay change, promotion, and service. If the group is Service, you can map your service group ID to a benchmark survey service ID.

You can specify whether to measure your group duration in days, months, or years. This defines the frequency for the values that you enter in the Group Low Value and Group High Value fields. For example, if you select a frequency of *Months* for the group type *Promotion*, then the system measures the duration since a person's last promotion in months. If you select *Days*, then the duration since the person's last promotion is measured in days, and so on.

The Group Low Value and Group High Value fields enable you to define the range of values for a duration group. If you create a group ID such as *No Service* or *No Age*, enter a value of 0 (*zero*) in both the Group High Value and Group Low Value fields.





## Chapter 4

# Importing External Survey Data to Data Warehouse Tables

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## Understanding External Survey Data

External survey data is workforce-related data that you obtain from third-party survey providers (such as market compensation data from compensation surveys). This topic discusses how to import external survey data from flat files into data warehouse tables using the IBM WebSphere DataStage ETL tool.

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## Reviewing Sources of External Survey Data

Workforce analytic applications are designed to integrate data from three main types of external surveys:

- Compensation surveys containing market compensation data, which you use in the modules within Workforce Rewards.
- Benchmark surveys containing workforce-related metrics, which you can use with analysis templates in HCM Warehouse.
- Employee surveys containing employee satisfaction and exit survey results, which you can use in the rules defined within Workforce Rewards.

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**Note:** You can import, by ETL, external data for Workforce Planning, such as employee competency data, competency dictionaries, skills inventories, standard proficiency ratings, job profiles, and so on. To do this, you must create your own flat files and ETL jobs. Our data model supports this, and you will have access to IBM WebSphere DataStage to create the jobs and run the ETLs.

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## Reviewing External Survey Tables and ETL Setup

The external survey data setup and import process is similar for each type of survey data. Oracle delivers the tools to enable you to import external survey data into EPM.

Oracle has worked closely with third-party survey providers to develop the file definitions, ETL jobs, and data warehouse tables that are delivered with Workforce Analytics. Oracle designed the delivered file definitions, ETL jobs, and data warehouse tables to work efficiently and seamlessly together.

This section discusses how to:

- Review the data warehouse tables and ETL jobs.
- Review the survey file definitions.

## Reviewing the Data Warehouse Tables and ETL Jobs

Before you begin, take some time to plan your approach and evaluate your external survey data needs.

Use the PeopleTools Application Designer to review the data warehouse tables that are delivered with EPM. Determine how to structure your system to best fit the needs of your organization.

Evaluate the ETL jobs that are delivered and determine whether they are properly configured to meet the needs of your organization.

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**Warning!** Any changes that you make to the delivered data warehouse tables have the potential to affect Application Engine processes and PeopleCode processing throughout the system. Evaluate and make these types of changes very carefully.

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### Related Links

"Understanding ETL in EPM (*PeopleSoft 9.1: Enterprise Performance Management Fundamentals*)"

## Reviewing the Survey File Definitions

Prior to ETL processing, you must ensure that your external survey data is in a standard flat file format to ensure detailed and accurate mapping to the data warehouse tables. In Workforce Analytics, Oracle delivers standard file definitions for the following external survey elements:

1. Author file (common to all types of surveys).
2. Dimension file (compensation survey and benchmark survey).
3. Survey Instance file (common to all types of surveys).
4. Compensation Survey file.
5. Benchmark Survey file.
6. Employee Survey file.

The standard file definitions are provided in the tables at the end of this topic, in the section Understanding the External Survey Flat File Definitions.

To use the ETL jobs that Oracle delivers, you must work with your survey provider to ensure that you receive your survey data in files meeting these definitions. This includes ensuring the proper ordering of the fields and using a comma-delimited \*.csv or \*.txt, flat file format. A \*.csv format file is recommended and preferred. Arrange to receive separate survey data flat files for each of the elements in the previous list. For compensation surveys, arrange to obtain author, survey instance, dimensions, and compensation survey files from the provider. For benchmark surveys, arrange to obtain author, survey instance, dimensions, and benchmark survey files from the provider. For employee surveys, arrange to obtain author, survey instance, and employee survey files from the provider.

If the external survey data that you receive is from a provider whose data doesn't fit these file definitions, then you have several options:

- Work with your current survey provider to make sure that you receive the survey data in a format that meets these file definitions.

- Work with a different survey provider who delivers the survey data in a format that meets these file definitions.
- Manipulate the survey data that you receive from your provider to change it into a format that meets these file definitions.
- Use our file definitions and delivered ETL jobs as templates, and modify them to suit your needs.

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## Viewing and Editing the Survey Data Warehouse Tables

After you have run the appropriate ETL jobs and imported your data into the Operational Warehouse - Enriched (OWE) tables, you can view and edit the data in the tables online.

**Note:** The following table lists pages used to view and edit survey data in the data warehouse tables. Because these pages are basic setup pages and the fields for the underlying tables are shown in the flat file definitions at the end of this topic, this topic doesn't discuss these pages in detail here.

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### Pages Used to View and Edit the Survey Data Warehouse Tables

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Survey Author	WA_AUTHOR_R00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Setup Survey Author	View and edit data about external survey providers and their address information.
Survey Instance	WA_SURVEY_R00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Setup Survey Instance	View and edit publication information about a survey.
Survey Job Code	WA_SUR_JOB_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Setup Survey Job Code	View and edit the job codes that are used in external surveys.
Survey Compensation Code	WA_SUR_COMP_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Setup Survey Compensation Code	View and edit external survey compensation codes.
Survey Geography ID	WA_SUR_GEO_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Setup Survey Geography ID	View and edit external survey geographical regions.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Survey Industry Code	WA_SUR_IND_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Setup Survey Industry Code	View and edit external survey industry categories.
Survey Financial Code	WA_SUR_FIN_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Setup Survey Financial Code	View and edit data about the financial size (based on factors such as sales or revenue) of companies participating in external surveys.
Survey Unit Code	WA_SUR_UNIT_D00	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Setup Survey Unit Code	View and edit data, other than financial data, that measures the relative size of companies participating in external surveys.

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## Completing Survey Mapping Definitions

To map survey data, use the WA\_MAP\_TREE\_TBL.GBL, WA\_JOB\_MAP\_DFN.GBL, WA\_COMP\_MAP\_DFN.GBL, WA\_GEO\_MAP\_DFN.GBL, WA\_IND\_MAP\_DFN.GBL, WA\_FIN\_MAP\_DFN.GBL, and WA\_UNIT\_MAP\_DFN.GBL components.

This section provides an overview of survey mapping definitions and discusses how to:

- Set up workforce trees.
- Map job codes.
- Map survey compensation codes.
- Map geography IDs.
- Map industry codes.
- Map financial codes.
- Map unit codes.

## Pages Used to Complete Survey Mapping Definitions

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Workforce Trees	WA_MAP_TREE_TBL	Workforce Analytics, Workforce Analytics Setup, Setup Workforce Trees, Workforce Trees	Specify the SetID, effective date, and names of the trees that you want the system to use. In Workforce Rewards (external surveys, market compensation) and Workforce Planning, many of the main dimensions get their hierarchical structure from trees.
Job Code Map	WA_JOB_MAP_DFN	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Job Code	Use this page to map survey job codes to nodes on the Workforce Analytics JOBCODE tree.
Mapping Notes	WA_DESCR_SPNL	From the Job Code Map, Compensation Code Map, Geography ID Map, Industry Map, Financial Code Map, or Unit Code Map page, click the Description button.	Enter a long description or more detailed mapping notes for any of the following primary pages that are applicable: Job Code Map, Compensation Code Map, Geography ID Map, Industry Code Map, Financial Code Map, or Unit Code Map.
Compensation Code Map	WA_COMP_MAP_DFN	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Compensation Code	Map survey compensation codes to nodes on the Workforce Analytics COMPCODE tree.
Geography ID Map	WA_GEO_MAP_DFN	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Geography ID	Map survey geography IDs to nodes on the Workforce Analytics GEOGRAPHY tree.
Industry ID Map	WA_IND_MAP_DFN	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Industry ID	Map survey industry IDs to nodes on the Workforce Analytics INDUSTRY tree.
Financial Code Map	WA_FIN_MAP_DFN	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Financial Code	Map survey financial codes to nodes on the Workforce Analytics FINCODE tree.
Unit Code Map	WA_UNIT_MAP_DFN	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Unit Code	Map survey unit codes to nodes on the Workforce Analytics UNITCODE tree.

## Understanding Survey Mapping Definitions

When you run the setup batch for salary surveys and benchmark surveys, the system partially populates the following OWE mapping tables: WA\_COMP\_MAP\_DFN, WA\_FIN\_MAP\_DFN, WA\_GEO\_MAP\_DFN, WA\_IND\_MAP\_DFN, WA\_JOB\_MAP\_DFN, and WA\_UNIT\_MAP\_DFN. Your next task is to complete the data mapping definitions using the access pages for these tables. The mapping definitions are needed to prepare for your second set of ETLs. In this step you map survey data to previously defined EPM dimensions (JOB, COMPENSATION, GEOGRAPHY, INDUSTRY, FINANCIAL, and UNIT) and trees (JOBCODE, COMPCODE, GEOGRAPHY, INDUSTRY, FINCODE, and UNITCODE).

### Common Elements

The following common elements apply to this section:

<b>SetID</b>	Select a SetID to access the survey mapping pages.
<b>Survey Instance</b>	Select a survey instance to access the survey mapping pages.

---

**Note:** Depending upon the page, you also specify one of the following: a survey job code, survey compensation code, survey geography ID, survey industry code, survey financial code, or survey unit code. The values for these fields are in the system for you to use as prompts after you have run the Setup batch of ETLs.

---

<b>Survey</b>	Displays the survey author ID that is associated with this survey instance.
<b>Description</b>	Click access the Mapping Notes page, where you can enter a long description or more detailed mapping notes (Access this page from these other pages: Job Code Map, Compensation Code Map, Geography ID Map, Industry Map, Financial Code Map, or Unit Code Map page, click the Description button. Access the Mapping Notes page by clicking the Description button).
<b>View Tree</b>	Click to access the Tree Viewer page, where you can specify the name of the tree node or detail to which you want to map your survey value. The system also displays the name of the current selection for the appropriate default <i>tree</i> . You indicated this tree on the Workforce Trees page.

## Workforce Trees Page

Use the Workforce Trees page (WA\_MAP\_TREE\_TBL) to specify the SetID, effective date, and names of the trees that you want the system to use.

In Workforce Rewards (external surveys, market compensation) and Workforce Planning, many of the main dimensions get their hierarchical structure from trees.

## Navigation

Workforce Analytics, Workforce Analytics Setup, Setup Workforce Trees, Workforce Trees

### Image: Workforce Trees setup page

This example illustrates the fields and controls on the Workforce Trees setup page. You can find definitions for the fields and controls later on this page.

**Note:** This page has SetID as a key. When you specify a default tree on this page for use with a Workforce Rewards application, the tree mapping value must remain constant. That is, the tree mapping must remain unchanged from the start of your market compensation survey import through your use of the survey data in the Workforce Rewards business process modules.

#### Job Code Tree, Compensation Code Tree, Geography Tree, Organization Tree, Account Tree, Position Tree, and Business Unit Tree

These trees are used in one or more of the workforce analytic applications. Prompt values are from the PF\_METATREE\_TBL table. This ensures that only those trees that have tree metadata are available to map.

#### Industry Tree, Financial Code Tree, and Unit Code Tree

These trees are used in the Workforce Rewards application. Prompt values are from the WA\_INDTREE\_VW, WA\_FINCODE\_VW, and WA\_UNITCODE\_VW tables, respectively.

#### Competency Tree

This tree is used in the Workforce Planning application. Prompt values are from the WA\_CMPT\_TREE\_VW table.

## Job Code Map Page

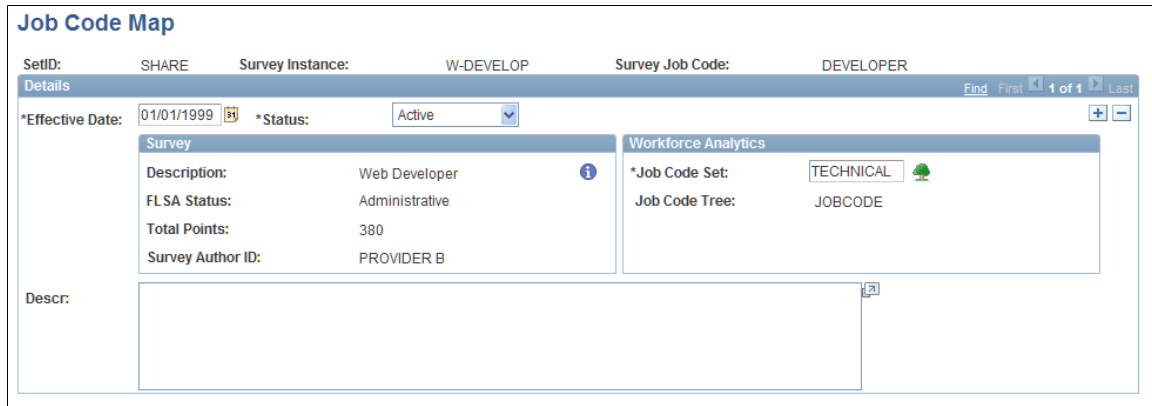
Use the Job Code Map page (WA\_JOB\_MAP\_DFN) to use this page to map survey job codes to nodes on the Workforce Analytics JOBCODE tree.

### Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Job Code

### Image: Job Code Map setup page

This example illustrates the fields and controls on the Job Code Map setup page. You can find definitions for the fields and controls later on this page.



#### Survey

Displays the description, FLSA status, and total points from the WA\_SUR\_JOB\_VW table.

#### Workforce Analytics

Select the job code set to which you want to map the survey job code (EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Employee and Job, Job Code Set).

#### Job Code Set

Job Code Set prompts you from the WA\_JBCDSET\_VW table. A job code set is a group of related job codes belonging to the same node on the JOBCODE tree. A leaf or detail on the tree is an individual job code.

## Compensation Code Map Page

Use the Compensation Code Map page (WA\_COMP\_MAP\_DFN) to map survey compensation codes to nodes on the Workforce Analytics COMPCODE tree.

### Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Compensation Code

#### Survey

Displays the description from the WA\_SUR\_COMP\_VW table.

#### Workforce Analytics

Select the compensation code to which you want to map the survey compensation code.

#### Compensation Code

Compensation Code prompts you from the COMPCODE\_VW table.



## Geography ID Map Page

Use the Geography ID Map page (WA\_GEO\_MAP\_DFN) to map survey geography IDs to nodes on the Workforce Analytics GEOGRAPHY tree.

### Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Geography ID

<b>Survey</b>	Displays the description from the WA_SUR_GEO_VW table.
<b>Workforce Analytics</b>	Select the geography ID to which you want to map the survey geography ID (EPM Foundation, Business Metadata, OW-E Dimension Maintenance, Common, Geography).
<b>Geography ID</b>	Geography ID prompts you from the GEOGRAPHY_VW table.

## Industry ID Map Page

Use the Industry ID Map page (WA\_IND\_MAP\_DFN) to map survey IDs to nodes on the Workforce Analytics INDUSTRY tree.

### Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Industry ID

<b>Survey</b>	Displays the description from the WA_SUR_IND_VW table.
<b>Workforce Analytics</b>	Select the industry ID to which you want to map the survey industry ID.
<b>Industry ID</b>	Industry ID prompts you from the WA_INDUSTRY_VW table.

## Financial Code Map Page

Use the Financial Code Map page (WA\_FIN\_MAP\_DFN) to map survey financial codes to nodes on the Workforce Analytics FINCODE tree.

### Navigation

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Financial Code

<b>Survey</b>	Displays the description, from value and to value from the WA_SUR_FIN_VW table.
<b>Workforce Analytics</b>	Select the financial code to which you want to map the survey financial code.

**Financial Code**

Financial Code prompts you from the WA\_FINCODE\_VW table. When you use the Tab key to move through the field, the system displays the associated from value and to value.

**Unit Code Map Page**

Use the Unit Code Map page (WA\_UNIT\_MAP\_DFN) to map survey unit codes to nodes on the Workforce Analytics UNITCODE tree.

**Navigation**

EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Map Unit Code

**Survey**

Displays the description, from value and to value from the WA\_SUR\_UNIT\_VW table.

**Workforce Analytics**

Select the unit code to which you want to map the survey unit code.

**Unit Code**

Unit Code prompts you from the WA\_UNITCODE\_VW table. When you use the Tab key to move through the field, the system displays the associated from value and to value.

**Reviewing Survey Mapping Definitions Online**

After you've entered your survey mapping definitions, you can view the survey mapping definitions at any time using the following pages.

**Pages Used to Review Survey Mapping Definitions Online**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Job Code Map	WA_SURMAP1_VW	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Review Job Code Map	Review job code mapping definitions online.
Compensation Code Map	WA_SURMAP2_VW	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Review Compensation Code Map	Review compensation code mapping definitions online.
Geography ID Map	WA_SURMAP3_VW	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Review Geography ID Map	Review geography ID mapping definitions online.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Industry Code Map	WA_SURMAP4_VW	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Review Industry Code Map	Review industry code mapping definitions online.
Financial Code Map	WA_SURMAP5_VW	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Review Financial Code Map	Review financial code mapping definitions online.
Unit Code Map	WA_SURMAP6_VW	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Review Unit Code Map	Review unit code mapping definitions online.
Job Code Set Map	WA_JOBMAP_VW	EPM Foundation, Business Metadata, OW-E Dimension Maintenance, HRMS, Survey, Review Job Code Set Map	Review job code set mapping definitions online.

---

## Reviewing the External Survey Flat File Definitions

This section provides an overview of external survey flat file definitions and discusses how to:

- Review the author file definition.
- Review the dimension file definition.
- Review the survey instance file definition.
- Review the compensation survey file definition.
- Review the benchmark survey file definition.
- Review the employee survey file definition.
- Review the valid values for selected fields in the file definitions.

## Understanding External Survey Flat File Definitions

This section discusses the external survey flat file definitions that you use to work with your survey providers. Work with your providers to ensure that the survey data you receive from them fits the format specified in these file definitions. The end of this section provides lists of the valid values for selected fields in the file definitions that must use specified valid values.

**Note:** Wherever fields in the file definitions are designated as optional, Oracle recommends that you enter data in those fields. If you don't enter data in the optional fields, the system displays error messages when you run the ETL job sequencers, and data is not supplied in those fields in the data warehouse tables.

## Reviewing the Author File Definition

The following table contains the Author flat file definition.

**Note:** You need the Author file when you have new author identification information. That is, you need it only when the survey provider data is new or has changed.

<b>Field Name</b>	<b>Field Type / Length / Format</b>	<b>Valid Values</b>	<b>Required or Optional</b>	<b>Target Warehouse Tables</b>
WA_AUTHOR_ID	Character / 10		R	WA_AUTHOR_R00. WA_AUTHOR_ID
EFFDT	Date / 8 / MMDDYYYY		R	WA_AUTHOR_R00. EFFDT
EFF_STATUS	Character / 1	Yes	R	WA_AUTHOR_R00. EFF_STATUS
ADDRESS1	Character / 35		R	WA_AUTHOR_R00. WA_ADDR_SBR
ADDRESS2	Character / 35		O	WA_AUTHOR_R00. WA_ADDR_SBR
ADDRESS3	Character / 35		O	WA_AUTHOR_R00. WA_ADDR_SBR
ADDRESS4	Character / 35		O	WA_AUTHOR_R00. WA_ADDR_SBR
CITY	Character / 30		R	WA_AUTHOR_R00. WA_ADDR_SBR
COUNTRY	Character / 3		R	WA_AUTHOR_R00. WA_ADDR_SBR
COUNTRY_CODE	Character / 3	Yes	R	WA_AUTHOR_R00. BUS_PHONE_SBR
DESCR	Character / 30		R	WA_AUTHOR_R00. DESCR
DESCRLONG	Long / 100		O	WA_AUTHOR_R00. DESCRLONG
EXTENSION	Character / 6		O	WA_AUTHOR_R00. BUS_PHONE_SBR
FAX	Character / 24		O	WA_AUTHOR_R00. BUS_PHONE_SBR

<b>Field Name</b>	<b>Field Type / Length / Format</b>	<b>Valid Values</b>	<b>Required or Optional</b>	<b>Target Warehouse Tables</b>
PHONE	Character / 24		R	WA_AUTHOR_R00. BUS_PHONE_SBR
POSTAL	Character / 12		R	WA_AUTHOR_R00. WA_ADDR_SBR
STATE	Character / 6		R	WA_AUTHOR_R00. WA_ADDR_SBR

### Image: Example row of Author file data in flat file format

The following example shows a single row of sample data, in comma delimited format, to help you create your author file.

```
PROVIDER A,01011999,A,111 Provider Way,Building A,5th Floor,Office 515,SAN
JOSE,USA,123,Sample Provider A,Sample Provider A,Provider A provides compensation
survey files,454556,555-111-1111,555-222-2222,12345,CA
```

## Reviewing the Dimension File Definition

The following table contains the Dimension flat file definition. With respect to the last two columns, please note the following:

- If WA\_SUR\_DIM\_TYPE = C, then the target record is WA\_SUR\_COMP\_D00.
- If WA\_SUR\_DIM\_TYPE = F, then the target record is WA\_SUR\_FIN\_D00.
- If WA\_SUR\_DIM\_TYPE = G, then the target record is WA\_SUR\_GEO\_D00.
- If WA\_SUR\_DIM\_TYPE = I, then the target record is WA\_SUR\_IND\_D00.
- If WA\_SUR\_DIM\_TYPE = J, then the target record is WA\_SUR\_JOB\_D00.
- If WA\_SUR\_DIM\_TYPE = U, then the target record is WA\_SUR\_UNIT\_D00.

**Note:** You need the Dimension file when you have a new or changed dimension information. The WA\_AUTHOR\_ID in the Dimension file must be a valid author identification in the Author file definition.

<b>Field Name</b>	<b>Field Type / Length / Format</b>	<b>Valid Values</b>	<b>Required or Optional</b>	<b>Target Warehouse Tables</b>	<b>Comments</b>
WA_AUTHOR_ID	Character / 10		R	Target record is WA_AUTHOR_ID	

<b>Field Name</b>	<b>Field Type / Length / Format</b>	<b>Valid Values</b>	<b>Required or Optional</b>	<b>Target Warehouse Tables</b>	<b>Comments</b>
WA_SUR_DIM_TYPE	Character / 1	Yes	R	Target record is *_CD	The '*' symbol could be G for Geography ID, J for Job Code, F for Financial Code, and so on.
WA_SUR_CODE	Character / 10		R	None	Driver for Target Record ETL mapping. These are the actual Geography, Compensation, Job Codes depending upon the WA_SUR_DIM_TYPE.
EFFDT	Date / 8 / MMDDYYYY		R	Target record is EFFDT	
EFF_STATUS	Character / 1	Yes	R	Target record is EFF_STATUS	
JOB_TYPE	Character / 1	Yes	R	Target record is FLSA_STATUS	Required only when type is J
WA_POINTS	Number / 3.0		R	Target record is WA_POINTS	Required only when type is J
WA_FROM_VALUE	Number / 15.0		R	Target record is WA_FROM_VALUE	Required only when type is F or U
WA_TO_VALUE	Number / 15.0		R	Target record is WA_TO_VALUE	Required only when type is F or U
DESCR	Character / 30		R	Target record is DESCR	

<i>Field Name</i>	<i>Field Type / Length / Format</i>	<i>Valid Values</i>	<i>Required or Optional</i>	<i>Target Warehouse Tables</i>	<i>Comments</i>
DESCRLONG	Long / 100		R	Target record is DESCRLONG	Required only when type is J

### Image: Example rows of Dimension file data in flat file format

The following example shows six rows of sample data, in comma delimited format, to help you create your Dimension file.

```
PROVIDER A,C,BASE,01011999 A,,,,Base Compensation
PROVIDER A,C,BONUS,01011999 A,,,,Bonus Compensation
PROVIDER A,F,ALL,01011999 A,,,1,10000000000,All Fincodes
PROVIDER A,G,NY,01011999 A,,,,New York
PROVIDER A,I,MANUFACT,01011999 A,,,,Manufacturing
PROVIDER A,J,2100,01011999,AA,300,,,Senior Web Developer
```

## Reviewing the Survey Instance File Definition

The following table contains the Survey Instance flat file definition.

**Note:** The Survey Instance file is required for a new survey instance with new survey data. The WA\_AUTHOR\_ID in this file must be a valid author identification in the Author file definition.

<i>Field Name</i>	<i>Field Type/ Length/ Format</i>	<i>Valid Values</i>	<i>Required or Optional</i>	<i>Target Warehouse Tables</i>
WA_SURVEY_ID	Character / 10		R	WA_SURVEY_R00. WA_SURVEY_ID
EFFDT	Date / 8 / MMDDYYYY		R	WA_SURVEY_R00. EFFDT
EFF_STATUS	Character / 1	Yes	R	WA_SURVEY_R00. EFF_STATUS
WA_AUTHOR_ID	Character / 10		R	WA_SURVEY_R00. WA_AUTHOR_ID
DESCR	Character / 30		R	WA_SURVEY_R00. DESCR
DESCRLONG	Long / 100		N	WA_SURVEY_R00. DESCRLONG
WA_PUBLICATION_DT	Date / 8		R	WA_SURVEY_R00. WA_PUBLICATION_ID

<b>Field Name</b>	<b>Field Type/ Length/ Format</b>	<b>Valid Values</b>	<b>Required or Optional</b>	<b>Target Warehouse Tables</b>
WA_SUR_CO_COUNT	Number / 8.0		R	WA_SURVEY_R00.WA_SUR_CO_COUNT
WA_SUR_EE_COUNT	Number / 8.0		R	WA_SURVEY_R00.WA_SUR_EE_COUNT
CURRENCY_CD	Character / 3.0	Yes	R	Note. This field is not mapped directly to the WA_SURVEY_R00 table. The ETL job uses the currency code as join condition to determine all of the setIDs from the WA_SET_CUR_VW with the given currency code. Then those setIDs are inserted in the WA_SURVEY_R00 table.

**Image: Example row of Survey Instance data in flat file format**

The following example shows a single row of sample data, in comma delimited format, to help you create your Survey Instance file.

```
WEB-DEV,01011999,A,PROVIDER A,Web Developers Salary Survey,Web Developers Salary Survey,01011999,12000,255555,USD
```

## Reviewing the Compensation Survey File Definition

The following table contains the Compensation Survey flat file definition.

---

**Note:** For the WA\_SURVALUE\_F00.WA\_MEASURE\_ID field, you should use the EPM Measure IDs that are delivered with the system. To add more requires modifications to the system. Also, note that the WA\_SURVALUE\_F00.WA\_MEASURE\_VAL field is for the actual monetary value of the measure, not the ID code.

---



<b>Field Name</b>	<b>Field Type / Length/ Format</b>	<b>Valid Values</b>	<b>Required or Optional</b>	<b>Target Warehouse Tables</b>
WA_SURVEY_ID	Character / 10		R	WA_IND_MAP_DFN. WA_SURVEY_ID WA _FIN_MAP_DFN.WA _SURVEY_ID WA _UNIT_MAP_DFN.WA _SURVEY_ID WA _JOB_MAP_DFN.WA _SURVEY_ID WA _COMP_MAP_DFN. WA_SURVEY_ID WA _GEO_MAP_DFN.WA _SURVEY_ID WA _SURVALUE_F00.WA _SURVEY_ID (ETL2)
WA_SUR_JOBCODE	Character / 10		R	WA_JOB_MAP_DFN. WA_SUR_JOBCODE
WA_SUR_ COMPCODE	Character / 10		R	WA_COMP_MAP _DFN.WA_SUR_ COMPCODE
WA_SUR_GEO_ID	Character / 10		R	WA_GEO_MAP_DFN. WA_SUR_GEO_ID
WA_SUR_IND_ID	Character / 10		R	WA_IND_MAP_DFN. WA_SUR_IND_ID
WA_SUR_FINCODE	Character / 10		R	WA_FIN_MAP_DFN. WA_SUR_FINCODE
WA_SUR_UNITCODE	Character / 10		R	WA_UNIT_MAP _DFN.WA_SUR_ UNITCODE
EFFDT	Date / 8 / MMDDYYYY		R	WA_SURVALUE_F00. EFFDT
COMP_FREQUENCY	Character / 1	Yes	R	WA_SURVALUE_F00. COMP_FREQUENCY
WA_MEASURE_ID	Character / 3	Yes	R	WA_SURVALUE_F00. WA_MEASURE_ID
WA_MEASURE_VAL	Number / 15.6		R	WA_SURVALUE_F00. WA_MEASURE_VAL
CURRENCY_CD	Character / 3	Yes	R	WA_SURVALUE_F00. CURRENCY_CD
WA_UNITS	Character / 1	Yes	R	ETL uses this to determine whether value conversion is required.

<b>Field Name</b>	<b>Field Type / Length/ Format</b>	<b>Valid Values</b>	<b>Required or Optional</b>	<b>Target Warehouse Tables</b>
WA_SAMPLE_CO_COUNT	Number / 8.0		R	WA_SURVALUE_F00. WA_SAMPLE_CO_COUNT
WA_SAMPLE_EE_COUNT	Number / 8.0		R	WA_SURVALUE_F00. WA_SAMPLE_EE_COUNT

**Image: Example rows of Compensation Survey data in flat file format**

The following example shows six rows of sample data, in comma delimited format, to help you create your Compensation Survey file.

```

WEBDEV,2100,BASE,ALL,ALL,ALL,ALL,01011999,A,5,33600,USD,1,1000,1000000
WEBDEV,2100,BASE,NY,ALL,ALL,ALL,01011999,A,5,36000,USD,1,1000,1000000
WEBDEV,2100,BASE,CA,ALL,ALL,ALL,01011999,A,5,37200,USD,1,1000,1000000
WEBDEV,2100,BASE,ALL,BANK,ALL,ALL,01011999,A,5,35400,USD,1,1000,1000000
WEBDEV,2100,BASE,ALL,MANUFACT,ALL,ALL,01011999,A,5,31800,USD,1,1000,1000000
WEBDEV,2100,BASE,ALL,ALL,<BIL,ALL,01011999,A,5,30000,USD,1,1000,1000000
    
```

**Reviewing the Benchmark Survey File Definition**

The following table contains the Benchmark Survey flat file definition.

**Note:** For the WA\_BENCHMRK\_F00.PF\_METRIC\_ID field, you should use the EPM measure IDs that are delivered with the system. To add more requires modifications to the system. Also, note that the WA\_BENCHMRK\_F00.WA\_MEASURE\_VAL field is for the actual value of the metric, not the ID code.

<b>Field Name</b>	<b>Field Type/ Len. / Format</b>	<b>Valid Value</b>	<b>Required or Optional</b>	<b>ETL</b>	<b>Target Warehouse Tables</b>
WA_SURVEY_ID	Character / 10		R	1,2	WA_IND_MAP_DFN.WA_SURVEY_ID WA_FIN_MAP_DFN.WA_SURVEY_ID WA_UNIT_MAP_DFN.WA_SURVEY_ID WA_GEO_MAP_DFN.WA_SURVEY_ID WA_BENCHMRK_F00.WA_SURVEY_ID (ETL2)
WA_SUR_GEO_ID	Character / 10		R	1	WA_GEO_MAP_DFN.WA_SUR_GEO_ID

<b>Field Name</b>	<b>Field Type/ Len. / Format</b>	<b>Valid Value</b>	<b>Required or Optional</b>	<b>ETL</b>	<b>Target Warehouse Tables</b>
WA_SUR_IND_ID	Character / 10		R	1	WA_IND_MAP_DFN.WA_SUR_IND_ID
WA_SUR_FINCODE	Character / 10		R	1	WA_FIN_MAP_DFN.WA_SUR_FINCODE
WA_SUR_UNITCODE	Character / 10		R	1	WA_UNIT_MAP_DFN.WA_SUR_UNITCODE
EFFDT	Date / 8 / MMDDYYYY		R	2	WA_BENCHMRK_F00.EFFDT
PF_METRIC_ID	Character / 3	Yes	R	2	WA_BENCHMRK_F00.PF_METRIC_ID
WA_MEASURE_VAL	Number / 15.6		R	2	WA_BENCHMRK_F00.WA_MEASURE_VAL
CURRENCY_CD	Character / 3	Yes	R	2	WA_BENCHMRK_F00.CURRENCY_CD
WA_UNITS	Character / 1	Yes	R	2	ETL uses this to determine whether conversion of value is required.
WA_SAMPLE_CO_COUNT	Number / 8.0		R	2	WA_BENCHMRK_F00.WA_SAMPLE_CO_COUNT

<i>Field Name</i>	<i>Field Type/ Len. / Format</i>	<i>Valid Value</i>	<i>Required or Optional</i>	<i>ETL</i>	<i>Target Warehouse Tables</i>
WA_SAMPLE_EE_COUNT	Number / 8.0		R	2	WA_BENCHMRK_F00.WA_SAMPLE_EE_COUNT

**Image: Example rows of Benchmark Survey data in flat file format**

The following example shows six rows of sample data, in comma delimited format, to help you create your Benchmark Survey file.

```
WFA_SURVEY,ALL,ALL,ALL,ALL,01011999,100,25000,USD,1,10,100000
WFA_SURVEY,CA,ALL,ALL,ALL,01011999,102,7000,USD,1,10,100000
WFA_SURVEY,NY,ALL,ALL,ALL,01011999,107,9750,USD,1,10,100000
WFA_SURVEY,ALL,BANK,ALL,ALL,01011999,100,25000,USD,1,10,100000
WFA_SURVEY,ALL,MANUFACT,ALL,ALL,01011999,100,25000,USD,1,10,100000
WFA_SURVEY,ALL,ALL,>BIL,ALL,01011999,100,50000,USD,1,10,100000
```

**Reviewing the Employee Survey File Definition**

The following table contains the Employee Survey flat file definition.

<i>Field Name</i>	<i>Field Type / Length/ Format</i>	<i>Valid Values</i>	<i>Required or Optional</i>	<i>Target Warehouse Tables</i>
WA_SURVEY_ID	Character / 10		R	WA_EESURVEY_F00.WA_SURVEY_ID
EFFDT	Date / 8 / MMDDYYYY		R	WA_EESURVEY_F00.EFFDT
EFF_STATUS	Character / 1	Yes	R	WA_EESURVEY_F00.EFF_STATUS
WA_RM_FACTOR_ID	Character / 10		R	WA_EESURVEY_F00.WA_RM_FACTOR_ID
PF_OBJ_ID	Character / 20		R	WA_EESURVEY_F00.PF_OBJ_ID
PF_OBJ_TYPE	Character / 4	Yes	R	WA_EESURVEY_F00.PF_OBJ_TYPE
WA_FACTOR_WEIGHT	Number / 5.0		R	WA_EESURVEY_F00.WA_FACTOR_WEIGHT
WA_SAMPLE_EE_COUNT	Number / 8.0		R	WA_EESURVEY_F00.WA_SAMPLE_EE_COUNT

## Reviewing the Valid Values for Selected Fields in the File Definitions

The following tables in this section provide lists of the valid values for selected fields in the file definitions that must use specified valid values.

### Effective Status

<i><b>EFF_STATUS Valid Values</b></i>
A = Active
I = Inactive

### Country Code

Valid values are any of the country codes in COUNTRY\_TBL.

### Survey Dimension Type

<i><b>WA_SUR_DIM_TYPE Valid Values</b></i>
C = Compensation
F = Financials
G = Geography
I = Industry
J = Job
U = Unit

### Job Type

<i><b>JOB_TYPE Valid Values</b></i>
A = Administrative
E = Executive
M = Management
N = Nonexempt
O = Outside Salesperson
P = Professional

<b><i>JOB_TYPE Valid Values</i></b>
X = None

## Currency Code

Valid values are any currency code in the CURRENCY\_CD\_TBL.

## Compensation Frequency

<b><i>COMP_FREQUENCY Valid Values</i></b>
A = Annual
B = Biweekly
D = Daily
H = Hourly
M = Monthly
S = Semimonthly
W = Weekly

**Note:** HCM Warehouse Workforce Insight analysis templates, as delivered, are set up to use compensation-frequency values of *Annual* only. Modification is needed if you want your analysis templates to use any other compensation frequency values.

## Units

<b><i>WA_UNITS Valid Values</i></b>
1 = Ones
2 = Hundreds
3 = Thousands
4 = 10 Thousands
5 = 100 Thousands
6 = Millions
7 = 10 Millions
8 = 100 Millions

<b><i>WA_UNITS Valid Values</i></b>
9 = Billions

## Object Type

<b><i>PF_OBJ_TYPE Valid Values</i></b>
1000 = Employee
2000 = Department
2100 = Business Unit
9000 = Job Code

## Measure ID and Metric ID Codes

<b><i>WA_MEASURE_ID / PF_METRIC_ID Valid Values</i></b>	<b><i>Description</i></b>	<b><i>Survey Type</i></b>
001	Y-Intercept- Natural	Compensation Survey
002	Slope- Natural	Compensation Survey
003	Standard Error	Compensation Survey
004	R-Squared	Compensation Survey
005	Actual 10th Percentile Amount	Compensation Survey
006	Actual 20th Percentile Amount	Compensation Survey
007	Actual 25th Percentile Amount	Compensation Survey
008	Actual 30th Percentile Amount	Compensation Survey
009	Actual 40th Percentile Amount	Compensation Survey
010	Actual 50th Percentile Amount	Compensation Survey
011	Actual 60th Percentile Amount	Compensation Survey
012	Actual 70th Percentile Amount	Compensation Survey
013	Actual 75th Percentile Amount	Compensation Survey
014	Actual 80th Percentile Amount	Compensation Survey

<b>WA_MEASURE_ID / PF_METRIC_ID Valid Values</b>	<b>Description</b>	<b>Survey Type</b>
015	Actual 90th Percentile Amount	Compensation Survey
016	Actual Average Amount	Compensation Survey
017	Actual 10th Percentile Percent	Compensation Survey
018	Actual 20th Percentile Percent	Compensation Survey
019	Actual 25th Percentile Percent	Compensation Survey
020	Actual 30th Percentile Percent	Compensation Survey
021	Actual 40th Percentile Percent	Compensation Survey
022	Actual 50th Percentile Percent	Compensation Survey
023	Actual 60th Percentile Percent	Compensation Survey
024	Actual 70th Percentile Percent	Compensation Survey
025	Actual 75th Percentile Percent	Compensation Survey
026	Actual 80th Percentile Percent	Compensation Survey
027	Actual 90th Percentile Percent	Compensation Survey
028	Actual Average Percent	Compensation Survey
029	Actual % of Eligible Employees	Compensation Survey
030	Target 10th Percentile Amount	Compensation Survey
031	Target 20th Percentile Amount	Compensation Survey
032	Target 25th Percentile Amount	Compensation Survey
033	Target 30th Percentile Amount	Compensation Survey
034	Target 40th Percentile Amount	Compensation Survey
035	Target 50th Percentile Amount	Compensation Survey
036	Target 60th Percentile Amount	Compensation Survey
037	Target 70th Percentile Amount	Compensation Survey
038	Target 75th Percentile Amount	Compensation Survey



<b>WA_MEASURE_ID / PF_METRIC_ID Valid Values</b>	<b>Description</b>	<b>Survey Type</b>
039	Target 80th Percentile Amount	Compensation Survey
040	Target 90th Percentile Amount	Compensation Survey
041	Target Average Amount	Compensation Survey
042	Target 10th Percentile Percent	Compensation Survey
043	Target 20th Percentile Percent	Compensation Survey
044	Target 25th Percentile Percent	Compensation Survey
045	Target 30th Percentile Percent	Compensation Survey
046	Target 40th Percentile Percent	Compensation Survey
047	Target 50th Percentile Percent	Compensation Survey
048	Target 60th Percentile Percent	Compensation Survey
049	Target 70th Percentile Percent	Compensation Survey
050	Target 75th Percentile Percent	Compensation Survey
051	Target 80th Percentile Percent	Compensation Survey
052	Target 90th Percentile Percent	Compensation Survey
053	Target Average Percent	Compensation Survey
054	Target % of Eligible Employees	Compensation Survey
055	Y-Intercept- Common	Compensation Survey
056	Slope- Common	Compensation Survey
057	R	Compensation Survey
058	Standard Error- Logarithmic	Compensation Survey
100	Productivity Factor	Benchmark Survey
101	Efficiency Factor	Benchmark Survey
102	Effectiveness Factor	Benchmark Survey

<b>WA_MEASURE_ID / PF_METRIC_ID Valid Values</b>	<b>Description</b>	<b>Survey Type</b>
103	Employee Compensation Return on Investment (ROI)	Benchmark Survey
104	Workforce Compensation ROI	Benchmark Survey
105	Employee Workforce ROI	Benchmark Survey
106	Contingent Workforce ROI	Benchmark Survey
107	Total Compensation Revenue Ratio	Benchmark Survey
108	Cash Compensation Revenue Ratio	Benchmark Survey
109	Benefits Revenue Ratio	Benchmark Survey
110	Total Compensation Expenses Ratio	Benchmark Survey
111	Cash Compensation Expenses Ratio	Benchmark Survey
112	Benefits Expenses Ratio	Benchmark Survey
113	Executive Ratio	Benchmark Survey
114	Supervisory Ratio	Benchmark Survey
115	Executive Compensation Ratio	Benchmark Survey
116	Supervisory Compensation Ratio	Benchmark Survey
117	Executive Compensation Factor	Benchmark Survey
118	Supervisory Compensation Factor	Benchmark Survey
119	Employee Compensation Factor	Benchmark Survey
120	Contingency Workforce Ratio	Benchmark Survey
121	Contingency Revenue Ratio	Benchmark Survey
122	Contingency Expenses Percent	Benchmark Survey
123	Contingency Expenses Ratio	Benchmark Survey
124	Total Labor Cost Revenue Ratio	Benchmark Survey
125	Total Labor Cost Expense Ratio	Benchmark Survey

<b>WA_MEASURE_ID / PF_METRIC_ID Valid Values</b>	<b>Description</b>	<b>Survey Type</b>
126	Transfer Ratio	Benchmark Survey
127	Promotion Ratio	Benchmark Survey
128	Hire Ratio	Benchmark Survey
129	Exempt Hire Ratio	Benchmark Survey
130	Non-Exempt Hire Ratio	Benchmark Survey
131	Increase Hire Ratio	Benchmark Survey
132	Replacement Hire Ratio	Benchmark Survey
133	Separation Ratio	Benchmark Survey
134	Exempt Separation Ratio	Benchmark Survey
135	Non-Exempt Separation Ratio	Benchmark Survey
136	Open Position Ratio	Benchmark Survey
137	Staffing- Hire Ratio	Benchmark Survey
138	Staffing- Exempt Hire Ratio	Benchmark Survey
139	Staffing- Non-Exempt Hire Ratio	Benchmark Survey
140	Staffing- Increase Hire Ratio	Benchmark Survey
141	Staffing- Replacement Hire Ratio	Benchmark Survey
142	Staffing- Open Position Ratio	Benchmark Survey
143	Time to Fill Factor	Benchmark Survey
144	Exempt Time to Fill Factor	Benchmark Survey
145	Non-Exempt Time to Fill Factor	Benchmark Survey
146	Hire to Separation Ratio	Benchmark Survey
147	Hiring Expenses Factor	Benchmark Survey
148	Exempt Hiring Expenses Factor	Benchmark Survey
149	Non-Exempt Hiring Expenses Factor	Benchmark Survey

<b>WA_MEASURE_ID / PF_METRIC_ID Valid Values</b>	<b>Description</b>	<b>Survey Type</b>
150	Hiring Expenses Ratio	Benchmark Survey
151	Tenure Profile	Benchmark Survey
152	Exempt Tenure Profile <=1 Year	Benchmark Survey
153	Exempt Tenure Profile <=3 Years	Benchmark Survey
154	Exempt Tenure Profile <=5 Years	Benchmark Survey
155	Exempt Tenure Profile <=10 Years	Benchmark Survey
156	Exempt Tenure Profile >10 Years	Benchmark Survey
157	Non-Exempt Tenure <=1 Year	Benchmark Survey
158	Non-Exempt Tenure <=3 Years	Benchmark Survey
159	Non-Exempt Tenure <=5 Years	Benchmark Survey
160	Non-Exempt Tenure <=10 Years	Benchmark Survey
161	Non-Exempt Tenure >10 Years	Benchmark Survey
162	Voluntary Separation Tenure <=1 Year	Benchmark Survey
163	Voluntary Separation Tenure <=3 Years	Benchmark Survey
164	Voluntary Separation Tenure <=5 Years	Benchmark Survey
165	Voluntary Separation Tenure <=10 Years	Benchmark Survey
166	Voluntary Separation Tenure >10 Years	Benchmark Survey
167	Exempt Voluntary Separation Tenure <= 1 Year	Benchmark Survey
168	Exempt Voluntary Separation Tenure <= 3 Years	Benchmark Survey
169	Exempt Voluntary Separation Tenure <= 5 Years	Benchmark Survey
170	Exempt Voluntary Separation Tenure <=10 Years	Benchmark Survey

<b>WA_MEASURE_ID / PF_METRIC_ID Valid Values</b>	<b>Description</b>	<b>Survey Type</b>
171	Exempt Voluntary Separation Tenure >10 Years	Benchmark Survey
172	Non-Exempt Voluntary Separation Tenure <=1 Year	Benchmark Survey
173	Non-Exempt Voluntary Separation Tenure <=3 Years	Benchmark Survey
174	Non-Exempt Voluntary Separation Tenure <=5 Years	Benchmark Survey
175	Non-Exempt Voluntary Separation Tenure <=10 Years	Benchmark Survey
176	Non-Exempt Voluntary Separation Tenure >10 Years	Benchmark Survey
178	Involuntary Separation Ratio	Benchmark Survey
179	Voluntary Separation Ratio	Benchmark Survey
180	Exempt Separation Ratio	Benchmark Survey
181	Exempt Involuntary Separation Ratio	Benchmark Survey
182	Exempt Voluntary Separation Ratio	Benchmark Survey
183	Non-Exempt Separation Ratio	Benchmark Survey
184	Non-Exempt Involuntary Separation Ratio	Benchmark Survey
185	Non-Exempt Voluntary Separation Ratio	Benchmark Survey
186	Employee Lost Time Factor	Benchmark Survey
187	FTE Lost Time Factor	Benchmark Survey
188	Workers' Compensation Expenses Ratio	Benchmark Survey
189	Employee Workers' Compensation Factor	Benchmark Survey
190	Workforce Workers' Compensation Factor	Benchmark Survey

<b><i>WA_MEASURE_ID / PF_METRIC_ID Valid Values</i></b>	<b><i>Description</i></b>	<b><i>Survey Type</i></b>
191	HR Readiness- Support Ratio	Benchmark Survey
192	Exempt Ratio	Benchmark Survey
193	Investment Factor	Benchmark Survey
194	HR Readiness- Expenses Ratio	Benchmark Survey
195	Employee Investment Factor	Benchmark Survey
196	Trained Employee Investment	Benchmark Survey
197	Training- Expenses Ratio	Benchmark Survey
198	Training- Support Ratio	Benchmark Survey
199	Healthcare Factor	Benchmark Survey
200	Benefits Compensation Expenses Ratio	Benchmark Survey

## Chapter 5

# Setting Up Workforce Groups and Group Sets

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## Understanding Workforce Groups and Group Sets

You can use workforce groups and group sets in workforce analytic applications for different purposes:

- In Workforce Planning, use workforce groups for match processing to specify which employees to include in a competency strategy scenario.
- In Workforce Rewards, use workforce groups to specify which employees to include in workforce reduction simulations and in retention and compensation planning scenarios.
- In Workforce Rewards, use groups and group sets to implement security.

Although you can include an entire workforce in one workforce group, groups are most often a subset of the workforce. You can define workforce groups by:

- Geographical regions.
- Departments.
- Job codes.
- Personnel classifications, such as Managers or Supervisors.
- Related jobs, such as All Developers.
- Compensation plans, such as Hourly Workers.
- Retention evaluation status, such as employees specified in retention management to retain, track, or reduce.

Although you can define universal workforce groups to use throughout Workforce Analytics, you typically create specific workforce groups to use with a particular rule, simulation, scenario, or function.

To use the workforce group and group set functionality in Workforce Analytics:

1. Plan your approach and determine the types of workforce groups that you need to create.
2. Use the Workforce Groups setup component to define workforce groups.
3. Use the Workforce Groups report to review the workforce groups setup.
4. Use the Workforce Groups process page to run the Build Workforce Groups process (WA\_BLDGRPS) in the Build Workforce Groups jobstream (WA\_BLDGRPS).

This process builds the workforce groups so that you can review the results before using the groups in an application.

5. Use the Workforce Groups inquiry page to review the results of the Build Workforce Groups process.
6. Use the workforce groups in a Workforce Rewards or Workforce Planning scenario or in Enterprise Performance Management (EPM) role security.
7. If necessary, use the Workforce Group Set setup component to define workforce group sets.
8. Use the Workforce Groups process page to run the Group Set jobstream (WA\_GROUPST) to create group sets and security roles based on the group set definition (that is, based on the security option selected on the Group Set setup page).

---

**Note:** Not all of the preceding steps apply to every Workforce Analytics application. The following sections explain the steps that are required for each application.

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## Defining Workforce Groups

To define workforce groups, use the WA\_CP\_GROUP\_DFN.GBL component.

This section provides an overview of constraints and discusses how to set up workforce groups.

### Pages Used to Define Workforce Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Workforce Group	WA_CP_GROUP_DFN	Workforce Analytics, Workforce Analytics Setup, Setup Groups, Workforce Group  Select a SetID and group ID.	Set up workforce groups for Workforce Rewards or Workforce Planning.
Workforce Group - Notes	WA_CP_GROUP_DFN2	Select the Notes tab on the Workforce Group setup page.	Add notes for a workforce group definition.

## Understanding Constraints

Constraints are collections of one or more filters. The system uses them to define subsets of data for processing. With respect to workforce groups, the applicable constraints and associated filters that you select should define the set of employees included in the group. You build constraints and filters using the Constraint Definition page and the Filter Definition pages.

You can use constraints to create an integration link between the Retention Strategy and Compensation Strategy modules of Workforce Rewards. In Retention Strategy, the scenario's final output for the decisions is stored in three tables, which are lists of employees to retain, employees to track, and employees to reduce. Oracle provides the following sample constraints to point to the data in these tables:

- EMPL\_REDUCE (retention results regarding employees to reduce).



- BASE\_PAY\_RETAIN (retention results regarding employees to retain by increasing base pay or by granting stock options).
- HIGH\_POTENTIAL (retention results for high-potential employees to track).
- HIGH\_RISK (retention results for high-risk employees to track).

These sample constraints appear under the SetID SHARE. Add them to your system and use them as templates. They are based on the data maps and table maps that are delivered with the system. After you add the constraints to the system, you can reference them from the Workforce Group setup page when creating workforce groups, and you can use them in the Compensation Strategy module.

See "Understanding Metadata (*PeopleSoft 9.1: Enterprise Performance Management Fundamentals*)"

## Workforce Group Page

Use the Workforce Group page (WA\_CP\_GROUP\_DFN) to set up workforce groups for Workforce Rewards or Workforce Planning.

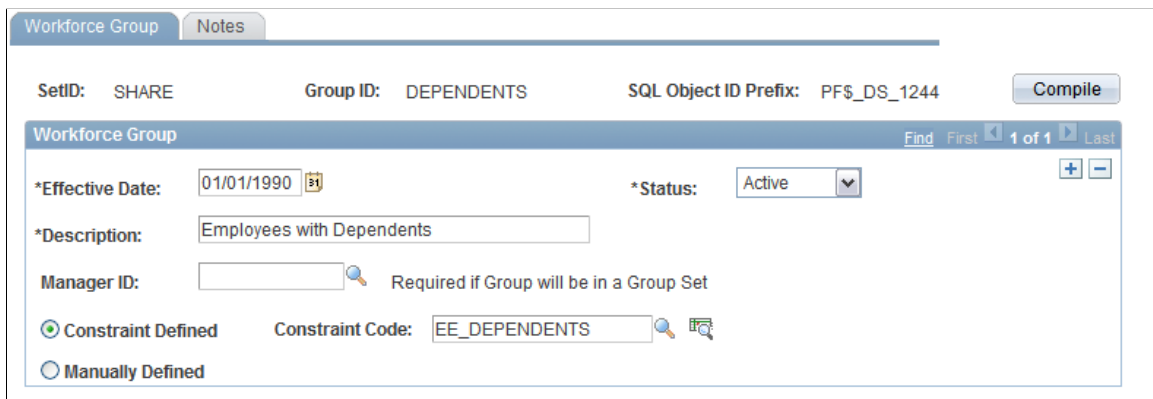
### Navigation

Workforce Analytics, Workforce Analytics Setup, Setup Groups, Workforce Group

Select a SetID and group ID.

### Image: Workforce Group page

This example illustrates the fields and controls on the Workforce Group page. You can find definitions for the fields and controls later on this page.



### Manager ID

Select a manager ID if you plan to use the group in a group set.

### Constraint Defined and Constraint Code

Select the Constraint Defined option and then select a constraint code to create a group based on a constraint. The system stores prompt values in the WA\_CONSTR\_VW table. You can select constraints based on WA\_JOB\_S00 or JOB\_F00 only.

The constraints must reference a data map that uses a table map for which the primary table is WA\_JOB\_S00 or JOB\_F00. To include simulated employees in your group (from the Workforce Simulation process of Workforce Rewards), create or select a constraint based on a table map with WA\_JOB\_S00

as the primary table. To exclude simulated employees, create or select a constraint based on a table map with JOB\_F00 as the primary table. Enter one constraint per workforce group. To create a group for use in Workforce Planning, create or select a constraint based on a tablemap with JOB\_F00 as the primary table.

**View Constraint Code**

Click to open the Constraint page and view details of the constraint code you have selected.

**Manually Defined**

To create a small static group, select the Manually Defined option and select an employee ID. The system stores prompt values in the PERSONAL\_SRCH view. When you select an employee, the system displays the employment record number and personal name. Add rows of data to enter multiple employees in the manual group definition.

**Compile**

Click to compile the SQL for the rule at any time.

The system automatically compiles the SQL for the rule when you save your work. In either case, the system displays the SQL object ID prefix.

## Building and Reviewing Workforce Groups

This section provides an overview of building workforce groups and lists the pages used to build and review workforce groups.

### Pages Used to Build and Review Workforce Groups

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Workforce Groups Run Control	WA_GP_JOBSTREAM	Workforce Analytics, Workforce Analytics Setup, Run Workforce Groups Jobstream, Workforce Groups Run Control	Use this page to generate workforce groups for use in Workforce Rewards or Workforce Planning.
Review Groups inquiry	WA_GROUP_INQ	Workforce Analytics, Workforce Analytics Setup, Review Groups, Review Groups	Review the workforce groups after running the group build process or after running a scenario-generating process in Workforce Rewards or Workforce Planning.

### Understanding Building Workforce Groups

You can build the workforce groups using a standalone process so that you can review the results before using the groups in an application. After you have completed setup of the workforce groups, run the Build Workforce Groups process in the WA\_BLDGRPS jobstream. The results are stored in the

WA\_GROUP\_F00 table. Then review the results of the process using the Workforce Groups inquiry page. This page displays the results (group members) of the PeopleSoft Application Engine processing. In the case of the standalone process, the results that you view with the inquiry page are the employees in the originally defined group, because the process has no other selection criteria or rules to narrow the group.

The group results that you see on the inquiry page depend on your row-level security access. The Workforce Groups inquiry page uses the WA\_GROUP\_SRCH table, which is a view for WA\_GROUP\_F00 that joins in the security table so that you can see only the results that your security access allows.

---

## Including Workforce Groups in Scenario Processes

You can use workforce groups in various scenario processes. These include the Match process in Workforce Planning and the Workforce Simulation process, the Retention Assignment process, the Compensation Planning process, and the Simulation process in Workforce Rewards.

When you run the scenario processes, a PeopleSoft Application Engine library named WA\_GRPBUILD is called. The process resolves the constraints and inserts the group members into a permanent table (WA\_GROUP\_F00), keyed by the business unit, scenario, fiscal year, accounting period, and group ID fields. This table stores the group results for viewing through an inquiry page.

Some processes, such as the Retention Assignment process in Workforce Rewards and the Match process in Workforce Planning, do not necessarily use the groups exactly as defined. In these cases, the scenario rules may narrow the group build results. For example, the Retention process may start with the employees in the group but exclude employees that do not appear in the overall group defined for the retention scenario. Consequently, if you have specified groups for the risk, cost, and value rules through the retention model and the group members do not belong to the overall group for the retention model, they are not used. For these types of scenario processes, the results that you view using the inquiry page are the employees selected from the scenario processing and not necessarily all of the employees in the original group.

The system uses the group ID as a dimension in the Workforce Rewards data marts.

To access the page where you include workforce groups in scenario processes select EPM Foundation, Job Processing, Setup Engines and Jobstreams, Processes in Jobstream

---

## Reviewing Workforce Group Results from Scenarios

This section discusses how to review workforce group results.

## Page Used to Review Workforce Group Results from Scenarios

Page Name	Definition Name	Navigation	Usage
Review Groups	WA_GROUP_INQ	Workforce Analytics, Workforce Analytics Setup, Review Groups, Review Groups	Review the workforce groups after running the group build process or after running a scenario-generating process in Workforce Rewards or Workforce Planning.

### Review Groups Page

Use the Review Groups page (WA\_GROUP\_INQ) to review the workforce groups after running the group build process or after running a scenario-generating process in Workforce Rewards or Workforce Planning.

#### Navigation

Workforce Analytics, Workforce Analytics Setup, Review Groups, Review Groups

#### Image: Review Groups page

This example illustrates the fields and controls on the Review Groups page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Review Groups' page interface. At the top, there is a 'Search Criteria' section with the following fields:
 

- \*Business Unit: CORP1
- \*Scenario ID: WFP1
- \*Fiscal Year: 2000
- \*Accounting Period: 1
- Group ID: (empty)
- Empl ID: (empty)

 A 'Search' button is located to the right of the search criteria. Below this is a table titled 'Workforce Groups' with columns: Group ID, Description, Empl ID, and Empl Rcd#. The table contains 10 rows of data for 'Workforce Planning Demo 1' groups, with Empl IDs ranging from WD0122 to WD0134 and all having an Empl Rcd# of 0.

Group ID	Description	Empl ID	Empl Rcd#
WFP_DEMO1	Workforce Planning Demo 1	WD0122	0
WFP_DEMO1	Workforce Planning Demo 1	WD0124	0
WFP_DEMO1	Workforce Planning Demo 1	WD0125	0
WFP_DEMO1	Workforce Planning Demo 1	WD0126	0
WFP_DEMO1	Workforce Planning Demo 1	WD0127	0
WFP_DEMO1	Workforce Planning Demo 1	WD0128	0
WFP_DEMO1	Workforce Planning Demo 1	WD0131	0
WFP_DEMO1	Workforce Planning Demo 1	WD0132	0
WFP_DEMO1	Workforce Planning Demo 1	WD0133	0
WFP_DEMO1	Workforce Planning Demo 1	WD0134	0

#### Business Unit

Select search criteria. Valid values are from the SP\_BU\_PF\_NONVW and SCENARIO\_SRCH tables, respectively.

<b>Scenario ID</b>	Select search criteria. Valid values are from the SP_BU_PF_NONVW and SCENARIO_SRCH tables, respectively.
<b>Fiscal Year, Accounting Period, Group ID, and EmplID (Employee ID)</b>	Narrow the search criteria by entering information in these fields. Prompt list values for the latter two fields are from the WA_CP_GROUP_DFN and PERSONAL_SRCH tables, respectively.
<b>Search</b>	When you have entered search criteria, click the Search button. The system displays the results of the search in the Workforce Groups group box. The results are from the WA_GROUP_SRCH table. For each member of a group included in the scenario, the system displays the group ID, employee ID, and employment record number.

---

## Defining Workforce Group Sets

A workforce group set is a collection of groups. You can define sets of workforce groups using the Workforce Group Set component.

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**Note:** Workforce group sets can be used to define security roles. Workforce group sets are not used in the other workforce analytic applications at this time.

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This section discusses how to set up workforce group sets.

## Pages Used to Define Workforce Group Sets

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Workforce Grp Set (Workforce Group Set)	WA_GRP_SET_DFN	Workforce Analytics, Workforce Analytics Setup, Setup Group Sets, Workforce Group Set  Enter a SetID and a workforce group set code.	Set up workforce group sets that can be used to define EPM security roles.
Workforce Group Set - Notes	WA_GRP_SET_DFN2	Select the Notes tab on the Workforce Grp Set page.	Add notes for a group set definition.

## Workforce Group Set Setup Page

Use the Workforce Grp Set (Workforce Group Set) page (WA\_GRP\_SET\_DFN) to set up workforce group sets that can be used to define EPM security roles.

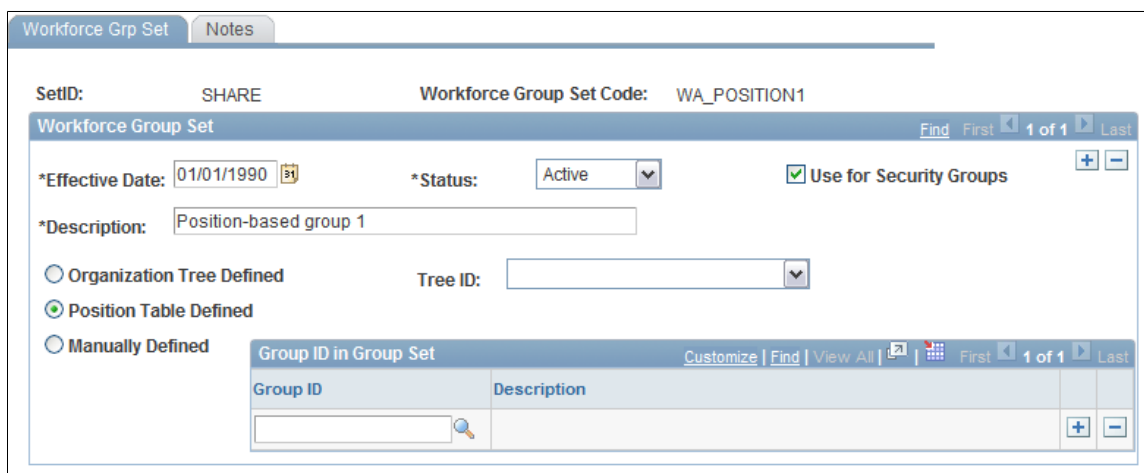
## Navigation

Workforce Analytics, Workforce Analytics Setup, Setup Group Sets, Workforce Group Set

Enter a SetID and a workforce group set code.

### Image: Workforce Grp Set setup page

This example illustrates the fields and controls on the Workforce Grp Set setup page. You can find definitions for the fields and controls later on this page.



#### Use for Security Groups

Select to create EPM security role definitions based on the groups within the group set. When you run the group set engines, the system verifies whether this check box is selected. If it is, the system defines and creates a security role for each organization tree or position table-based group (department or position) selected in the group set.

The system allows only one position-based and one organization-tree-based group set for which the Use for Security Groups check box is selected. You can define multiple groups based in Organization trees or the Position table (POSITION\_D00), but only one of each when the security check box is selected.

#### Organization Tree Defined

You can define a group set based on the Organization (Department) tree. To do this, select Organization Tree Defined, and then select the appropriate tree name.

#### Tree Name

Prompt list values are from the PF\_METATREE\_TBL table.

#### Position Table Defined

For security, the group is defined as all of the people in the departments who roll up to the specified department. The manager may be included in the group, depending on the department that the manager is in. You can define a group set based on the Position table. To do this, select Position Table Defined. If the group set is predominately for use in security, then the group is defined as all of the people below who roll up to a manager (or position). Whether the manager is included in the group should be defined in the Position table.

---

**Warning!** When more than one person is assigned to an employee's Reports To position in the Position table, the Build Workforce Groups Application Engine process ends abnormally. If having multiple Reports To positions for a single employee is valid (for example, if the organization uses job-sharing), review the data and match each employee with a single Reports To position.

---

### Manually Defined

If you have a small group set, you can define it manually. To do this, select Manually Defined. Then select a group ID from the prompt list values, which are stored in the WA\_GRPSET\_MN\_VW table. This table limits the selection to groups that have a manager ID selected on the Group Definition page. To include multiple groups in the group set, add rows of data.

---

## Running the Group, Group Set, and Security Processes

You run the Standalone WF Groups (standalone workforce groups) jobstream and the Group Set jobstream from the Workforce Groups process page. To access the Workforce Groups process page, select Workforce Analytics, Workforce Analytics Setup, Run Workforce Groups Jobstream. To process EPM Role Security based on the group set that you generated, select EPM Foundation, EPM Security, Advanced, Request Security Processing.

## Understanding Workforce Group and Group Set Processes

The following table summarizes the various delivered jobstreams, jobs, and engines that you can run for workforce groups and groups sets and describes their purpose:

<b>Jobstream ID and Name</b>	<b>Job ID and Name</b>	<b>Engine ID and Name</b>	<b>Program ID / Name</b>	<b>Purpose</b>
WA_BLDGRPS / Standalone WF Groups	WA_BLDGRPS / Build Workforce Groups	WA_BLDGRPS / Build Workforce Groups	WA_BLDGRPS / Build Workforce Groups	Run this jobstream to build the workforce groups. This is an optional step for verifying the population of the group or verifying that the constraint obtains the right group. You can run this jobstream before you use the groups in an application. The results of the process are not used in any other processing.
	WF_GP_MRG / Standalone WF Groups	MERGE / Final Table Merge	PF_MERGE / Final Table Merge	

<b>Jobstream ID and Name</b>	<b>Job ID and Name</b>	<b>Engine ID and Name</b>	<b>Program ID / Name</b>	<b>Purpose</b>
WA_GROUPST / Group Set	WA_GROUPST / Group Set Job  WA_GPST_MG / Group Set Merge	WA_GROUPST / Group Set Job  MERGE / Final Table Merge	WA_GROUPSET / WA Group Set  PF_MERGE / Final Table Merge	Run this jobstream to create group sets and associated security role definitions.

## Group and Group Set Primary Output Tables

When you run the Build Workforce Groups process as a standalone process, the final output table is the WA\_GROUP\_F00 table.

In Workforce Planning, the Match process calls the Build Workforce Groups process to create the group during scenario processing. This is also the case for the Workforce Rewards Retention Assignment, Workforce Simulation, and Compensation Planning and Simulation processes. In these cases, the final output table is the WA\_GROUP\_F00 table, but the group results you see may differ from the original group definition.

The output tables for the WA Group Set process (WA\_GROUPSET) are:

<b>WA_GROUPSET_F00</b>	Contains group set and associated groups.
<b>WA_GRPSETAR_F00</b>	Contains all direct reports for each group in the group set. For example, a group created for the department at the top of the Organization tree would have everyone attached to the organization tree in it.
<b>WA_GROUP_F00</b>	Contains all direct reports for each group. This is the same output table as for the Build Workforce Groups process.
<b>WA_GRPSTMGR_F00</b>	Contains the groups and manager IDs for the groups.