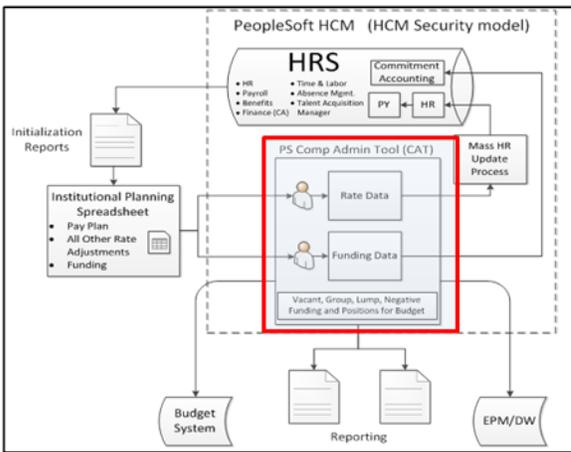


6.1 - Introduction to the Compensation Administration Tool (CAT)

The UW System Executive Committee for Enterprise-wide Administrative Systems has sponsored a project to replace much of the functionality hosted in the legacy budget system, replacing all salary line related entry that was previously done in 3270 using the BDGT, BADJR, and BRATE transactions. The Compensation Administration Tool (CAT) will be used to establish funding splits during the annual budget development cycle for all filled positions and to enter all vacant, group (i.e. graduate assistant), and lump sum salary line entries.

What is the CAT?



- A tool built in PeopleSoft to manage compensation and funding changes during the budgeting cycle, that will:
- ✓ Replace BDGT, BADJR, BRATE transactions in 3270 (eliminating person level data in the mainframe system!)
 - ✓ Transfer finalized compensation and funding data to HRS and summary level data to the budget system
 - ✓ Give users the ability to enter proposed compensation and funding changes directly into PeopleSoft and bypass the IPS
 - ✓ Give users the ability to edit proposed compensation and funding changes previously loaded from the IPS
 - ✓ Support advanced search capabilities
 - ✓ Display a summary of an employee's historical record in HRS, for easy reference

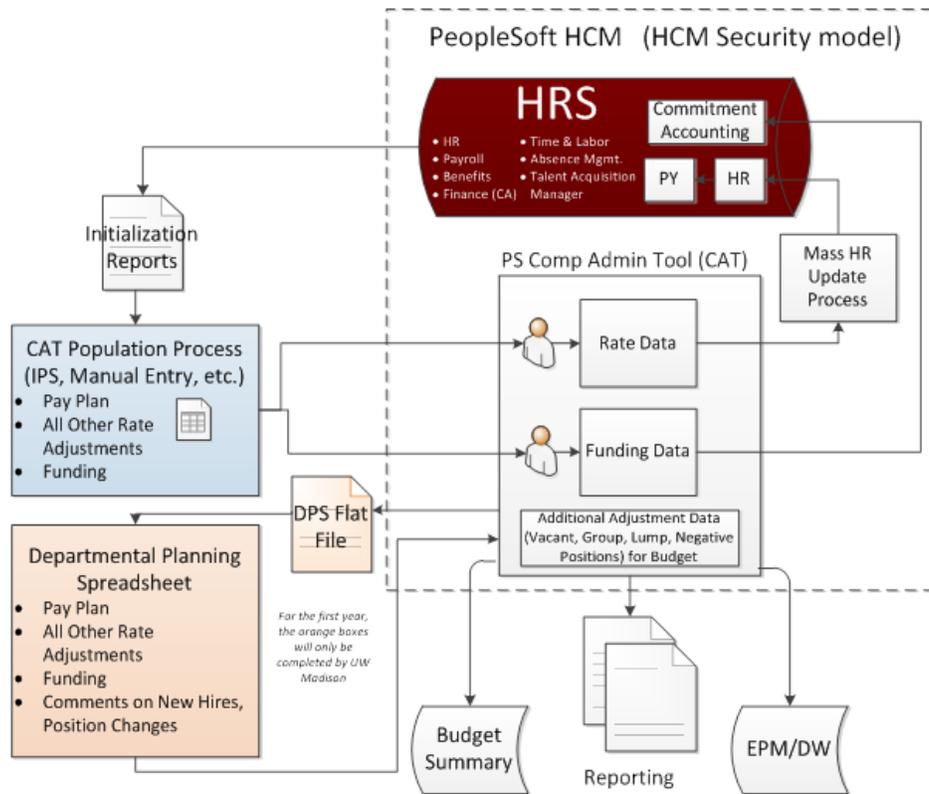
- ✓ Display summary information by Business Unit, Dept, etc.
 - ✓ Will have necessary checks and edits to ensure data accuracy
- The tool will NOT:
- ✓ Replace the mainframe budget system entirely
 - ✓ Be updated en masse without the IPS

CAT is a bolt-on to the HRS system and has similar functionality to HRS. However, users do not need to have access to employee job data or payroll transactions in HRS to use CAT. The Departmental Planning Spreadsheet (DPS) will be used to pull the initialized staff salary and funding data out of the CAT for review by divisional and departmental users, replacing the 2A report distribution that was previously populated from 3270.

Staff in the Madison Budget Office will load data for all of UW-Madison from HRS job and commit accounting tables as of mid-January. This data pull will capture future terminations, position number changes, rate and title changes, and commitment accounting changes that have been entered with effective dates up to and including 7/1 of the upcoming fiscal year. Data will be populated for 9 and 12 month faculty and academic staff (excluding graduate assistants, as well as lecturers and faculty assistants with a continuity code of “terminal”), limited staff, university staff (excluding student help and LTE) employees-in-training (excluding post-doctoral trainees).

Two major enhancements of the CAT over the legacy system are the HRS Job Data Feed and live connection to SFS combo edits. While the live HRS Job Data Feed is active, changes entered in HRS home department, pay basis, job code, FTE, expected job end date, leave status, and terminations will flow through to the CAT record. The feed will “push” compensation rate changes through to be reflected in the CAT Comprate. This, along with CAT no longer requiring users to reconcile to the previous year’s rate, will eliminate the need for many of the midyear and proposed adjustments that had to be entered in the legacy system as placeholders. The CAT can also run funding edits against the upcoming fiscal year edit combo tree. If users want to establish payroll splits for the upcoming fiscal year, they will check the funding “Ok to Load to HRS” check box. This will ensure compliance with the actuals ledger for all staff funding data you wish to pass to commitment accounting. For all staff for whom you do not wish to establish future payroll splits, you can uncheck the funding “Ok to Load to HRS” checkbox. This will run the data against the standard CAT budget ledger edits that were used in the legacy system.

Overall Process Flow



The Compensation Administration Tool Manual will detail out:

- Business process rules and best practices for entering data into the CAT,
- Data entry processes in CAT,
- Generating, printing, entering data changes, using track changes, and updating pivot tables in the Departmental Planning Spreadsheet,
- Description and use of all CAT reporting,
- How to run instructions for all CAT reports,
- A description of the CAT EPM dataviews and CAT EPM data dictionary,
- Data entry instructions for the Additional Adjustments Page (AAP), and
- Instructions for non-salary entry, and
- Balancing your budget in the legacy budget system.

Here is a listing of useful acronyms that will be referenced throughout all CAT documentation:

CAT Key Acronyms and Terminology

- AAP – Additional Adjustments Page
- BSUM – Mainframe Budget Summary Pages
- CA – Commitment Accounting
- CAT – Compensation Administration Tool
- CSB – Continuing Staff Base
- DPS – Departmental Planning Spreadsheet
- EJED – Expected Job End Date
- EPM – Enterprise Performance Management
- HRS – Human Resource System
- IR – Initialization Report
- IPS – Institutional Planning Spreadsheet
- SFS – Shared Financial Services
- 3270 – Mainframe Budget System