SALARY MANAGEMENT COLLECTION
Quick Reference Guide

WHO SHOULD USE THIS DATA COLLECTION?

Anyone who wants to use Salary Management (SalMgt) data for operational support or historical analysis, for things such as:

- tracking employee payments by job, date, account segments, or earnings type
- reporting on faculty and staff biographical and job information over time
- monitoring hours works by weekly regular and temporary staff
- reporting on faculty compensation categories
- keeping track of pay distributions

WHAT TYPES OF BUSINESS QUESTIONS CAN I ANSWER USING THE SALMGT DATA COLLECTION?

There are a great many business questions that can be addressed using the SalMgt data collection, from the simple to the complex. For example:

- Do I have any distributions ending for staff this month that I have to attend to and update before the close of payroll?
- How has my organization's headcount changed over time?
- What percentage of faculty in my school have administrative stipends in addition to their professor pay?
- What are the outstanding salary encumbrances for the grants I manage?
- Do any of the faculty or staff in my school have roles or distributions whose states need to be changed to "Final" before the next pay period so their compensation isn't disrupted?
- How much progress has my ORG made in entering data for this year's Salary Increase Program and does the data so far look to be in line with university guidelines?

COLLECTION DESCRIPTION

The **Salary Management Data Collection** is a subset of the University Data Warehouse containing biographical information about employees, information on their roles/jobs, and financial data on their compensation (encumbrances, distributions and payments).

- **Refreshed nightly** (Monday through Friday evenings) -- biographical, role and job data from PennWorks and the mainframe Payroll system as well as Change Log data and the Primary Appointment calculation.
- **Refreshed on Monday evenings** -- Payment data, including the PAR tables, after the computation of payroll and encumbrances for weekly employees on the mainframe system.
- **Refreshed on the last Friday before the last weekly Payroll run for the month** -- payment data for monthly employees
- **Created monthly**, on the first day of the new account period -- employee, distribution and role/job snapshots for the prior period
- **Data sources:** PennWorks system, as well as the mainframe Payroll Salary Management and Position Inventory systems.
- **Data tables/elements:** See *Table* to obtain the explanation, common uses, primary keys, indexed data elements, and related tables for a table. See *Elements* to obtain the definition, list
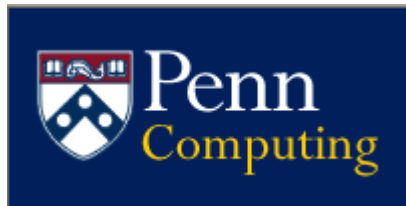
of values, formats, and not null values for each data element in the table. For more information https://www.isc.upenn.edu/salary-management-data-collection#Tables-and-Data-Elements.

DATA INCLUDED IN THE SALARY MANAGEMENT DATA COLLECTION

- **RSALMGT Universe –** provides employee biographical, job, distribution, encumbrance and payment data; for more detailed information and diagrams http://provider.www.upenn.edu/computing/da/dw/salmgt/salmgt.html
- **RSALMGT Snapshots (RSALsnap) Universe -** facilitates historical reporting of employee and role/job-related data; for more detailed information and diagrams http://provider.www.upenn.edu/computing/da/dw/salmgt/rsalsnap.html
- **RSALMGT PAR (RSALPAR) Universe –** joins the restricted PAR tables to the generally available RSALMGT universe; for more detailed information and diagrams http://provider.www.upenn.edu/computing/da/dw/salmgt/rsalpar.html
- **Employee General Universe –** provides basic employee and primary appointment information with no salary or job details; for more detailed information and diagrams http://provider.www.upenn.edu/computing/da/dw/salmgt/empgen.html

SALMGT DATA COLLECTION TIPS & TRICKS

- **Planned payments to employees, encumbered payments and actual payment expenditures are stored in different tables**:
  - Distributions may be found in COMP_PERSON_DISTRIBUTION , COMP_DISTRIBUTION_EXT and EMPLOYEE_DISTRIBUTION;
  - Encumbrances are in EMPLOYEE_ENCUMBRANCE;
  - Payment data is available in EMPLOYEE_PAYMENT, EMPLOYEE_PAYMENT_SUMMARY and PAR_EARNINGS. (Hours worked are only stored in PAR EARNINGS)
- When reporting on organizations, be sure to select the data element that meets your needs:
  - **Home ORG** is the organization responsible for managing the employees PennWorks record
  - **Role or Job ORG** is the organization for which the employee works, for a particular job, and manages that role record in PennWorks
  - **COA_ORG (Distribution COA ORG or Posted COA ORG)** is the organization segment of the COA_ACCOUNT (the 26-position Accounting Flexfield). The_RESPONSIBLE_ORG is the code for the organization responsible for managing the fund.
- **The COMP_PERSON and EMPLOYEE tables contain one record per employee, with only the latest information about a person.** To look at historical biographical or job information, use the snapshot versions of the tables.
- **It is often easiest to use ACCOUNTING_PERIOD when setting the record selection conditions for payments, encumbrance, PAR and snapshot queries.** If, instead, MONTH or FISCAL_MONTH_SEQ are used in the record selection conditions for a query, FISCAL_YEAR ought to be used as well
- **To pull matching data** from BEN Financials, Salary Management, and the Data Warehouse at the end of a period, you'll need to run your system reports and Warehouse queries between the Tuesday after payroll runs, producing the last weekly check for the month, and before the Monday of the following week.
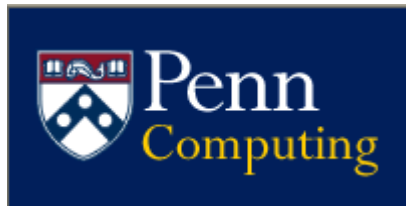
SALARY MANAGEMENT COLLECTION
Quick Reference Guide

SALMGT DATA QUALITY ADVISORIES

All data corrections must be done in the source system, so that the corrected information can flow to the warehouse in the next load. If you find something that you feel is incorrect, please verify this by comparing the data to PennWorks or Payroll, and then reporting confirmed discrepancies to Data Administration. If it is truly a data problem, it will need to be passed to Human Resources or the Payroll Office for resolution

ADDITIONAL SALMGT DATA COLLECTION INFORMATION

- For **corporate reports** involving SalMgt/PennWorks data, see https://www.isc.upenn.edu/salary-management-data-collection#Reports.
- SalMgt-specific **self-paced tutorial**: http://provider.www.upenn.edu/computing/da/dw/salmgt/howtutorial.html

FOR ADDITIONAL HELP WITH SALMGT DATA COLLECTION

- Write to SALMGT-WH@LISTS.UPENN.EDU (this is a monitored list; subscription is automatic for people who obtain access to the SalMgt data collection).
- Write to da-staff@isc.upenn.edu (Enterprise Information & Analytics).