



Microsoft Dynamics AX 2012 R3 CU8

Total Compensation Statement

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Table of Contents

COURSE OVERVIEW	1
MODULE 1: TOTAL COMPENSATION STATEMENT	2
Lesson 1: Total Compensation Statement	3
Total Compensation Statement Setup	3
Create a Total Compensation Statement	5
Glossary	8
Worker.....	8
Benefit	8

Course Overview

This course explains and introduces the Total Compensation Statement.

Audience

This course is intended for Microsoft Support Professionals, Consultants, and IT Professionals.

Before You Begin

Before starting this course, you should:

- Complete [80538](#): Human Resource Management in Microsoft Dynamics AX 2012.
- Complete [80541](#): Payroll in Microsoft Dynamics AX 2012.

What You Will Learn

After completing this course, you will be able to:

- Describe the Total Compensation Statement.

Module 1: Total Compensation Statement

This module introduces the Total Compensation Statement feature available in Microsoft Dynamics AX 2012 R3 Cumulative Update 8 (CU8).

While employees certainly know their current salary, employers often provide many other benefits to employees which are less visible. Employees may overlook these benefits when thinking about the total investment a company makes in the employee. Providing employees with a Total Compensation Statement can help companies improve satisfaction levels and improve employee retention.

Estimated time to complete this module: 60 minutes

Before You Begin

Before starting this module, you should:

- Complete [80538](#): Human Resource Management in Microsoft Dynamics AX 2012..
- Complete [80541](#): Payroll in Microsoft Dynamics AX 2012.

What You Will Learn

After completing this module, you will be able to:

- Describe how to create and view a Total Compensation Statement for each worker.
- Describe how to create sections within the Total Compensation Statement.

Lesson 1: Total Compensation Statement

This lesson explains and introduces how to create and view a Total Compensation Statement for each worker.

What You Will Learn

After completing this lesson, you will be able to:

- Describe how to create and view a Total Compensation Statement.

Total Compensation Statement Setup

Contoso distributes Total Compensation Statements to all of its employees at the end of the year. This year Contoso want to enhance their Total Compensation Statement to include the “fringe benefits” that Contoso provides to its employees. A new section will need to be included in the end of year Total Compensation Statement.

Setup

To create a new section in the Total Compensation Statement, perform the following steps:

1. Click **Human Resources**, click **Setup**, click **Compensation**, and then click **Total Compensation Statement Sections**.
2. Create a new Total Compensation Section.
3. Click **New**. In the **Statement section ID** field, enter **Fringe**. In the **Statement section name** field, enter **Fringe Benefits**.

Figure 1: Fringe Benefit section for the Total Compensation Statement

Figure 1: Fringe Benefit section for the Total Compensation Statement

Earnings FastTab

To add earning codes to the line, perform the following steps:

1. Click **Add earning code**.
2. Select **Fitness Allowance** and click **Add**.
3. Click **Add earning code**.
4. Select **Travel Reimbursement** and click **Add**.
5. Repeat this process for any earning codes you need to add for this Total Compensation Statement Section.
6. Once completed, click **Close** to close the form.

The screenshot shows the 'Total compensation statement sections (1)' window. On the left, a list of statement sections includes 'Fringe'. On the right, the 'Earnings' section is expanded, showing a table with columns 'Earning type', 'Earning', and 'Description'. Two rows are visible: 'Fitness...' and 'Travel ...'. The 'Fringe' section is also listed in the 'Statement section ID' field.

Figure 2: Earning codes added to the Total Compensation Statement Section

Create a Total Compensation Statement

Total Compensation Statement

To run the Total Compensation Statement, perform the following steps:

1. Click **Human Resources**, click **Reports**, click **Workers**, and then click **Total Compensation Statement**.
2. In the **Total compensation statement** form, enter the following dates:
 - In the **From date** field, enter **1/1/2012**
 - In the **To date** field, enter **12/31/2012**.



Note:

The **Fringe Benefits** section will be listed in the Available box with all the available Total Compensation Statement Sections.

3. Select all the available **Total compensation statement sections** you wish to include.
4. You can use the **Move Up** and **Move Down** buttons to create the order you want to see on the Total Compensation Statement.
5. In the **Total row test** field, you can remove the text there and replace it with Total Compensation.

**Note:**

You can customize the **Statement title** and the **Total row** for the **Total compensation statement**. For example, you could create a Benefits Statement by selecting only **Total compensation statement sections** that contained Benefits. The **Statement title** could be changed to **Benefits Statement** and the **Total row text** could be changed to **Total Benefits**.

- Click **Select** if you want to filter the report to print only for certain workers, such as workers in a certain department or position. Click **OK** to print the report.

Figure 3: Form to run the Total Compensation Statement

**Note:**

Data will only show up on the report for the completed pay run. The Payment Journal must have the payment sent and posted along with having the Pay Statement posted.

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File Options

1 of 1 100% Find | Next

Total compensation statement

Contoso Entertainment System USA

11/4/2014 2:37 PM

From date 1/1/2013
To date 11/4/2014
Name Grant Culbertson
Personnel number 000507
Position Machine Operator

	Your contributions	Company contributions
Fringe Benefit		
Fitness allowance		80.00
Travel reimbursement		150.00
Total Fringe Benefit		230.00
Total Compensation		230.00

Close

Figure 4: Total Compensation Statement Report

Glossary

The following list of terms and resources are provided if you are unfamiliar with this functional domain.

Worker

An internal party (person). A worker is hired to work for a company, organization, or legal entity, and can be an employee or a contractor.

Benefit

Microsoft Dynamics AX uses the term “Benefit” to refer to all types of non-wage compensation. These include, but are not limited to:

- Pension and Retirement Plans
- Health and Welfare Plans
- Mandatory Insurance (For Example: unemployment and State Disability).