



PeopleSoft 8.00.01 Human Resources PeopleBook

Administering Training

PeopleSoft 8.00.01 Human Resources PeopleBook: Administering Training

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Index

ADMINISTERING TRAINING

This book provides the information you need for implementing and using the Administer Training module of PeopleSoft Human Resources. You can order the online version by requesting SKU HRB8SP1R0, or the hardcopy version by requesting SKU MAHRBr8SP1B 1200.

Overview of Administering Training provides a brief overview of the process for setting up training tables, training budgets, and tracking student training and costs in PeopleSoft Human Resources.

Defining Training Courses and Programs describes how you set up information on courses both in-house and outside your organization, and how you prepare to track student training data.

Setting Up Training Costs discusses how to set up your Budget Training business process, including setting up currency default and conversions, setting up budget periods, and setting up department budgets.

Defining Training Requirements covers how you determine your organization's training needs, and link your training needs to the costs of training in terms of materials and employee compensation.

Planning Training Budgets for Your Organization explains how you can create department and global scenarios to predict the cost of your training demands.

Administering Course Sessions is where you learn how to administer training sessions in-house, including setting up course sessions and specifying the costs of course sessions to your organization.

Enrolling or Waitlisting Students discusses how to enroll students into courses manually, or using automatic enrollment features. You'll also learn how to link your enrollments to your training budgets.

Tracking Student Training shows you how to maintain student training data, including sessions taken in-house and external courses.

Tracking Training Costs describes how to track training costs that are reimbursed to students and how to evaluate your actual training costs against your training budgets.

Tracking Professional Education Programs for German Workers explains how to set up and administer German Professional Education Programs if your organization offers them to workers.

Producing the French Training Report 2483 describes the procedure for setting up your system to record training costs for the 2483 training report and how to generate the report.

Running Administer Training Reports explains how to generate the Administer Training Reports and describes the contents of the reports.

CHAPTER 1

Overview of Administering Training

Fully trained employees can help your organization to stay in the forefront of industry—they're motivated and continuously preparing for new challenges. Whether your organization offers training programs to employees, customers, or contractors, the PeopleSoft Training Administration business process helps you meet all of your organization's training needs.

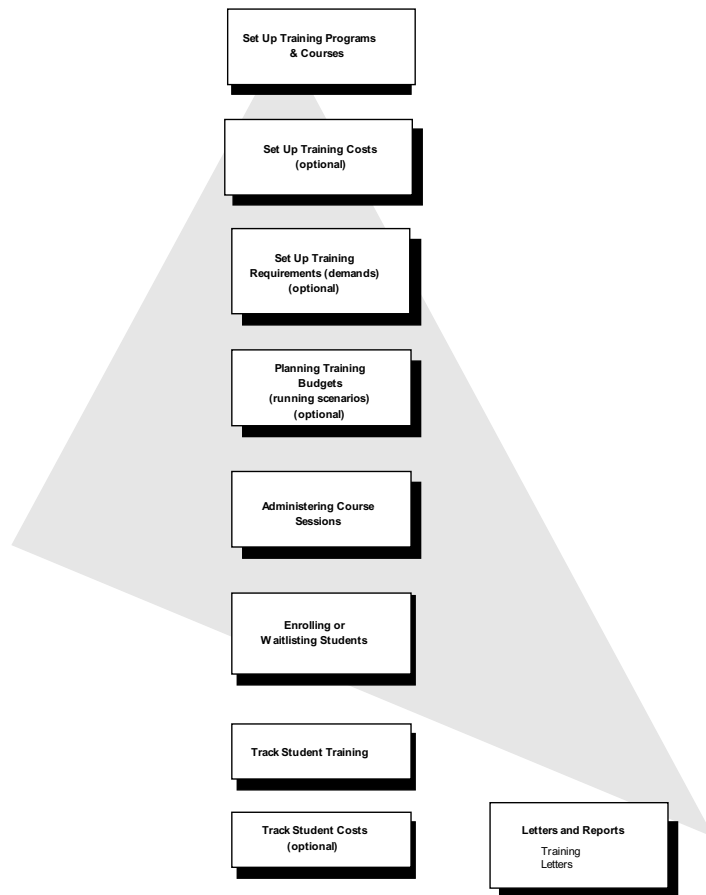
To streamline training administration, you set up standard codes in several areas, such as information on courses, instructors, and outside vendors, and you'll define your organization's training budgeting requirements. Once this data is in the system, you can easily administer course sessions and training programs.

Tracking where, when, and who goes to training is more important than ever before. In a fast-paced, global market, organizations need to keep their employees trained and up to date in the latest technologies, regulations, and procedures. With your Training Administration module, you can accurately track the demand for training in your enterprise at the department or employee level, create different budgeting scenarios, or models, to look at your options for meeting your enterprise's training demand, and run what-if scenarios to see how different training budgets impact your organization. You can then compare your approved training budget with your actual training costs to learn how to budget for training better in the future.

In some industries, it is imperative that organizations have documentation on who has been trained, when they were trained, and what grade they received. For example, hospitals have had certain certifications revoked because they couldn't provide adequate documentation on how the hospital trains its orderlies. In France, organizations are required by law to report on their employee training programs to government agencies. Trying to stay on top of all of this training information manually can be an administrative nightmare. PeopleSoft Training Administration gives you the flexibility and functionality to meet these reporting requirements.

Training Administration Process Overview

The following diagram provides you with an overview of the Training Administration business process and the steps you go through to set up your training programs, define your budgets, and administer your training programs.



Training administration business process overview



If you aren't administering training budgets using the Budget Training menu, you don't need to set up training costs and budgets. These steps are marked optional in the diagram.

Defining Training Courses and Programs

To streamline Training Administration, you can set up standard codes in several areas, such as information about courses, instructors, and outside vendors. Once this data is in the system, you can easily administer course sessions and training programs—and you'll always use consistent information.

Overview of Training Courses and Programs

Setting Up Training Administration Tables

Before you set up training courses or work on training budgets, you'll want to define several areas related to training administration. These include not only the components of courses, such as vendors, locations, training facilities, and instructors, but also the course objectives and requirements. You'll also define codes for tracking education and skills that employees had before they joined your organization and update employee qualifications and skills as they enroll in and take the courses that you administer as part of the Administer Training business process.

Setting Up Training Courses and Programs

With your training administration tables defined, you are ready to add the training courses and programs that you'll administer for your organization. To set up training programs and track employee skills and accomplishments, you create courses in the Course Table. Here you define course information and how those courses will be categorized in your company training catalog. You can also identify course prerequisites, target competencies (if you're using the Manage Competencies business process in PeopleSoft Human Resources) and certifications, and specify standard equipment and materials required to administer courses.

Courses are the foundation of in-house course session administration for your organization. Before you can set up course sessions, however, you must set up the courses themselves in your system. You can use course codes to track external courses that your workers attend frequently, such as classes offered at local colleges or trade associations.

Once you set up your course information, you can specify a course structure for your organization. You can group courses into categories and subcategories and then place them in a training catalog that you can define for your enterprise. This level of organization enables you to work with an additional degree of accuracy when you administer and plan training for your workforce.

Before You Begin

This section describes the prerequisites for Administering Training. Make sure that these tasks are complete before you consider setting up training courses.

Setting Up Global and Local Country Control Tables

You'll find all the core and local country setup tables, pages, and functionality described in this section in the **Develop Workforce**, **Administer Training** menu.

You should use the Administer Training menu that's appropriate for your implementation of PeopleSoft Human Resources. If you're not sure which of the menu you should use, ask your human resources project leader.

The procedures for accessing and entering information in these tables mirror those for updating any PeopleSoft table or page.



For more information about accessing and entering data on the pages, see the general tutorial in Using PeopleSoft 8 Applications.

Before you start working with the tables described in this section, make sure the control tables have been set up in PeopleSoft Human Resources.



For more information about the control tables, see Setting Up Control Tables.

Setting Up Your Manage Competencies Business Process

When you set up training courses, you have the option to define competencies and accomplishments that are:

- Required to teach the course.
- Assigned to students after successful completion of the course.

If you want to use these features, you need to set up some or all of these tables:

- **Competency Table.** Use the Competency Table to organize and group competencies.
- **License/Certification Table.** Use the License/Certification Table to define the licenses or certificates that are required to teach the course or achieved by completing the course.
- **Language Table.** If you want to track your employees' and non-employees' language skills, set up language codes in the Language Table.
- **Major Table.** Use this table to identify areas of study.
- **Test Table.** Use the Test Table to track the standard tests that you administer to job applicants or employees who are applying for positions within your organization, such as typing,

programming aptitude, or mathematical tests. You can include a test code as an instructor requirement.

- **Membership Table.** If instructors need to belong to professional organizations or other associations to teach specific courses, you need to add these membership codes to the Membership Table.

Federal users must set up the following table:

- **Degree Table.** Use the Degree Table to identify the degree types and years of study that are associated with those degrees.

If you want to use PeopleSoft Human Resources to track courses at schools and colleges, you have the option to create codes in the **School Table**.

You can access these tables from the Administer Training menu. They are the same tables that you access from the Manage Competencies menu.



For more information about these tables, see Setting Up Competencies and Accomplishments.

Setting Up Training-Related Vendors

You'll probably outsource some of the services you use to run training course sessions. For example, you might hold some courses in hotel conference rooms, use conference administrators to organize them, or use caterers to provide meals for attendees. In the Vendor tables, you can enter information about the vendors that you use frequently and thus save yourself time when you organize new course sessions. Once this information is set up, you can associate external instructors with vendors.

Use the Vendor Table pages to enter the vendor profile and address and any comments you have about them. Use the Vendor Contact Table to enter specific information about the people you work with at each vendor.

Vendor Table - Vendor Profile Page

Usage	Use the Vendor Profile page to enter basic details for a vendor, including a description of the vendor and the vendor type.
Object Name	TRN_VENDR1_TBL_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Vendor Table, Vendor Profile • Develop Workforce, Administer Training (USF), Setup, Vendor Table, Vendor Profile • Develop Workforce, Budget Training (GBL), Setup, Vendor

	Table, Vendor Profile
Prerequisites	None.
Access Requirements	Enter a Vendor ID.

Vendor Profile Address

Vendor ID: KUVND2

*Description: Training Solutions Short Desc: Train Sol

*Vendor Type: Training Provider

Accounts Payable Vendor ID:

France

Financing Type:

Certification

Certified Number: Date:

Specialty:

Agreement View All First 1 of 1 Last

*Agrmt Date	*Agreement Type	*Co	Agrmt Nbr

Vendor Table - Vendor Profile page (1 of 2)

USA

Minority Owned

Vendor Table - Vendor Profile page (2 of 2)

The system displays the **Vendor ID** you selected. This field is for information only.

Description Enter the vendor name

Short Desc (short description) Enter an abbreviated description of the vendor.

Vendor Type Select a vendor type from the available options.

Accounts Payable Vendor ID Enter an **Accounts Payable Vendor ID**; this field is optional.

France

For French companies only, you need to define additional vendor information.

Financing Type

If the vendor type is a *Financing Fund*, select the **Financing Type** that your company will use. Valid values are *FAF* and *FONGECIF*.

In France, where professional training is mandatory (dependent on certain conditions), all companies are required to contribute to training funds. The contributions are weighted according to company size, with larger companies contributing more.

The contributions are made to the Fonds Assurance Formation (*FAF*), or Training Insurance Fund.

Apart from the standard training courses, employees can also take a one-year sabbatical training leave called Conge Individuel de Formation (CIF) or Individual Sabbatical Leave. These are managed through another fund called FONds de GEstion du Conge Individuel de Formation (*FONGECIF*).

France - Certification

If the **Vendor Type** is a *Training Provider*, enter the provider's certification details in the **Certification** group box.

Certified	Select this check box if the provider is certified by the Government.
Number	If you selected the Certified check box, enter the certification number.
Date	If you selected the Certified check box, enter the certification date.
Specialty	Select the provider's area of expertise from the available options.

France - Agreement

For each training provider, record all agreements that have been reached between your organization and the provider. This is required for the French legal reporting requirements. Add a row for each agreement.

Agrmt Date (agreement date)	Enter the date of the agreement between your organization and the training provider.
Agreement Type	Select the type of agreement from the available options: <i>Simple</i> , <i>Annual</i> , and <i>Multi-ann</i> (multi-annual).
Co (company)	Select the provider name from the vendors you defined on the Vendor Table.

Agrmt Nbr (agreement number)

Enter the number of the agreement between your organization and the training provider.



For more information about the French Training Report 2483, see Producing the French Training Report 2483.

USA

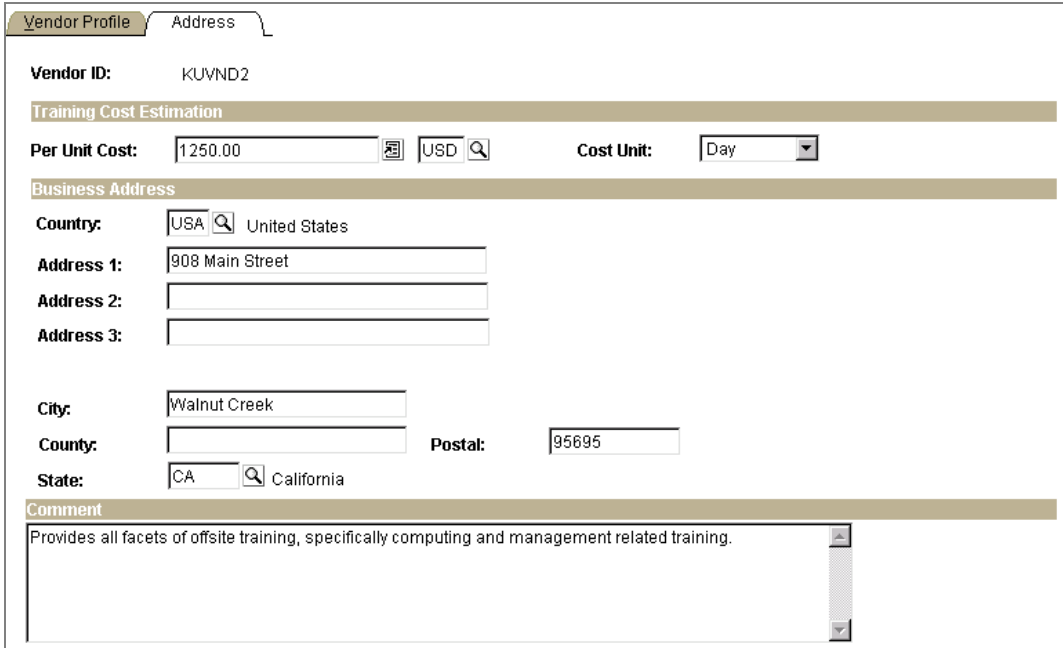
For U.S. organizations only, specify minority ownership information for vendors.

Minority Owned

Select the **Minority Owned** check box if the vendor's business is owned by a member of an ethnic minority.

Vendor Table - Address Page

Usage	Use the Vendor Table - Address page to record a vendor's address and the default cost charged by the vendor.
Object Name	TRN_VENDR2_TBL_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Vendor Table, Address • Develop Workforce, Administer Training (USF), Setup, Vendor Table, Address • Develop Workforce, Budget Training (GBL), Setup, Vendor Table, Address
Prerequisites	You must set up the vendor ID on the Vendor Profile page before you can enter the vendor's address.
Access Requirements	Enter a Vendor ID.



Vendor Table - Address page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Address, City, County, State, Postal.**

Vendor ID The system displays the **Vendor ID** you selected. This field is for information only.

Training Cost Estimation

Per Unit Cost Enter the vendor cost and update the currency in the currency field if necessary. The system uses this value as a default cost when you define vendor costs as part of setting up the course costs.

Cost Unit Select the unit for the vendor cost from the list of valid cost units.

Business Address

Country Select a country from the list of valid values. When you move out of the field, the system displays the appropriate address fields for the country selected, using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields displayed.



For more information about the automatic address formatting feature, see Country Table - Address Format Page.

Setting Up Vendor Contact Details

Once you've added vendors to the system, use the Vendor Contact Table component to enter information about the specific people you work with at each vendor.

You can also use the Vendor Table to track Finance Fund providers for French Training programs if you're administering training programs for French employees and need to generate the French Training Report 2483.



For more information about how you associate Finance Fund providers for training programs with training costs for French employees, see Tracking Training Costs.

Vendor Contact Table - Vendor Contact Phone Page

Usage	Use the Vendor Contact Phone page to enter details of your contacts at the vendor.
Object Name	TRN_VNDR_CNTCT_TB1
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Vendor Contact Table, Vendor Contact Phone • Develop Workforce, Administer Training (USF), Setup, Vendor Contact Table, Vendor Contact Phone • Develop Workforce, Budget Training (GBL), Setup, Vendor Contact Table, Vendor Contact Phone
Prerequisites	Before you can set up vendor contact information, add the vendor to the Vendor Table.
Access Requirements	Enter a Vendor ID.

The screenshot shows a web interface for managing vendor contacts. At the top, there are tabs for 'Vendor Contact Phone' and 'Vendor Contact Address'. Below the tabs, the 'Vendor' is identified as 'KUVND2 Training Solutions'. A 'Vendor Contact' table contains one entry with the following details: Contact # 1, Name 'McGuire, Bradley', Title 'Senior Consultant', and Contact Type 'Bookings'. Below this, a 'Contact Phone Numbers' table lists a 'Business' phone number '510 7459254'. Both tables include navigation controls like 'View All', 'First', '1 of 1', and 'Last', along with '+' and '-' buttons for adding or removing rows.

Vendor Contact Table - Vendor Contact Phone page

The system displays the **Vendor ID** you selected. This field is for information only.

Vendor Contact

- Contact #** (contact number) The system assigns a sequential number to each **Contact** that you add. You can renumber the contacts, if necessary.
- Name** Enter the contact's **Name**.
- Title** Enter the contact's job **Title**.
- Contact Type** Enter the type of contact.

Contact Phone Numbers

In this group box, add a row for each number, such as a business telephone number, fax number, and cellular phone number.

- Phone Type** Select the type of number from the available options.
- Phone** Enter the phone number.

Vendor Contact Table - Vendor Contact Address Page

Usage	Use the Vendor Contact Address page to record the address of your contacts at for the selected vendor.
Object Name	TRN_VNDR_CNTCT_TB2
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Vendor Contact Table, Vendor Contact Address

	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (USF), Setup, Vendor Contact Table, Vendor Contact Address • Develop Workforce, Budget Training (GBL), Setup, Vendor Contact Table, Vendor Contact Address
Prerequisites	You must enter the contact's name on the Vendor Contact Phone page before you can enter the contact's address on this page.
Access Requirements	Enter a Vendor ID.

Vendor Contact Phone | Vendor Contact Address

Vendor: KUVND2 Training Solutions

Vendor Contact View All First 1 of 1 Last

Contact #: 1

Name: McGuire,Bradley

Business Address

Same Address as Vendor

Country: USA United States

Address 1: 908 Main Street

Address 2:

Address 3:

City: Walnut Creek

County: Postal: 95695

State: CA California

Vendor Contact Table - Vendor Contact Address page

These fields are for information only. The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Address, City, Country, Postal, State.**

Vendor Contact

The system displays the **Vendor, Contact #** (contact number), and the contact's **Name** that you selected.

Business Address

Same Address as Vendor

Select this check box if the contact’s address is the same as the vendor address you entered on the Vendor Table. If you select the check box, the system displays the vendor address and makes the address fields unavailable for entry.

When you change the vendor address in the Vendor Table, the system automatically updates the Business Address in the Vendor Contact Table for all contacts with the **Same Address as Vendor** check box selected.

Country

Select a country from the list of valid values. When you move out of the field, the system automatically displays the appropriate address fields for the country selected, using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields displayed.



For more information about the automatic address formatting feature, see Country Table - Address Format Page.

Setting Up Training Equipment and Facilities

When you set up a training course, you define the equipment and materials needed for the course so that you can book equipment, when scheduling a course session. Use the Equipment and Materials Table to define codes for the training equipment and materials that you need to track.

Use the Training Facility Table to identify the locations where courses are held. You use this information to help you schedule course sessions. Here you can enter information such as on- or off-site addresses, training rooms available at the facility, equipment available, facility cost, and even directions for getting there.

Equipment and Materials Table Page

Usage	Use the Equipment and Materials Table page to identify the equipment and materials used for training courses. You use these codes for listing the equipment that is required to administer course sessions in-house. To help you make sure that all necessary equipment is available where the courses will take place, you can also associate equipment and materials with training facilities.
Object Name	TRN_EQUIP_TABLE
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup,

	<p>Equipment and Materials Table, Equipment and Materials Table</p> <ul style="list-style-type: none"> • Develop Workforce, Administer Training (USF), Setup, Equipment and Materials Table, Equipment and Materials Table • Develop Workforce, Budget Training (GBL), Setup, Equipment and Materials Table, Equipment and Materials Table
Prerequisites	None.
Access Requirements	Enter an Equipment and Materials Code.

Equipment and Materials Table

Equipment/Materials Code: K016

***Equipment Type:**

***Description:**

Short Description:

Publications

Author:

Year Published:

ISBN:

Equipment and Materials Table page

The system displays the **Equipment/Materials Code** you selected. This field is for information only.

Equipment Type Select the **Equipment Type** from the available options.

Description Enter a long **Description**.

Short Description Enter a **Short Description**.

Publications

Author Enter the **Author** name.

Year Published Enter the **Year Published**.

ISBN Enter an **ISBN**.



You can associate costs with materials and equipment on the Training Facilities Table. This enables you to account for varying costs of training materials that depend on where your training courses are taught.

Training Facility Table - Address Page

Usage	Use the Address page to record the address of each Training Facility your organization uses. Training Facilities can be on company premises or off-site at an external vendor's facility.
Object Name	TRN_FACILITY_TBL1
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Training Facility Table, Address • Develop Workforce, Administer Training (USF), Setup, Training Facility Table, Address • Develop Workforce, Budget Training (GBL), Setup, Training Facility Table, Address
Prerequisites	None.
Access Requirements	Enter a Training Facility code.

Address Contacts and Equipment Training Rooms Directions

Training Facility: KUFAC1

Business Unit: GBIBU **Location Code:** KUNY00 Corporation Headquarters

Facility Name: Corporation Headquarters **Short Desc:** US HQ

Mail Drop: _____

Country: USA United States

Address 1: 500 George Washington Pkway

Address 2: _____

Address 3: _____

City: New York

County: _____ **Postal:** 07666

State: NY New York

Training Facility Table - Address page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Address, City, County, Postal, State.**

Business Unit Select the **Business Unit** linked to the training facility.

Location Code

If the training facility is internal (on company premises), select a **Location Code**. You can select only **Location Codes** that are assigned to the Business Unit you selected.

If you go back and change the **Business Unit** after you've entered a **Location Code**, and the **Location Code** isn't tied to this **Business Unit**, the system displays the warning message "Location will be cleared. It is not valid for this Business Unit" and clears the **Location Code** field on the page.

If the training facility is off-site (external to your company), leave the **Location Code** field blank.

Facility Name

If you didn't enter a **Location Code**, enter the **Facility Name** and **Address**.

If you entered a **Location Code**, the system completes the **Facility Name** and makes this field unavailable for entry.

Mail Drop

Enter a **Mail Drop** identifier, if there is a designated collection point for mail addressed to the training facility.

Note. The **Mail Drop** isn't part of the normal address and therefore isn't included in the standard training letters supplied by PeopleSoft.

Country

If you entered a **Location Code**, the system completes the **Country** field automatically. If you didn't enter a Location, select the country from the list of valid values.

When you move out of the field, the system dynamically generates the proper address format for that country, as specified on the Country Table, Address Format page.



For more information about how address formatting works, see Setting Up Control Tables.

Training Facility Table - Contacts and Equipment Page

Usage	Use the Contacts and Equipment page to record a contact name and telephone number for the training facility and list the equipment available.
Object Name	TRN_FACILITY_TBL2

Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Training Facility Table, Contacts and Equipment • Develop Workforce, Administer Training (USF), Setup, Training Facility Table, Contacts and Equipment • Develop Workforce, Budget Training (GBL), Setup, Training Facility Table, Contacts and Equipment
Prerequisites	If you want to track the equipment available at your training facilities, you must first set up the Equipment and Materials Table.
Access Requirements	Enter a Training Facility code.

Training Facility Table - Contacts and Equipment page

The system displays the **Training Facility**, **Business Unit**, and **Location** you selected. These fields are for information only.

Contact Name Enter a **Contact Name** for the training facility.

Vendor ID If the contact works for a vendor, select the **Vendor ID**. Valid Vendor IDs are stored in the Vendor Table.

Contact Phone Numbers

Phone Type Select a **Phone Type** from the available options, and enter the contact phone number in the next field.

Phone Enter the phone number.

Equipment/Materials Available

Use the **Equipment/Materials Available** group box to list all equipment that is shared between training rooms. Don't include fixed equipment that is tied to a particular training room. Fixed equipment is listed on the Training Facility Table - Training Rooms Page.

Equipment/Materials Code Select an **Equipment/Materials Code** from the list of valid values. When you move out of this field, the system displays the equipment name. You define these values in the Equipment and Materials Table.

Qty (quantity) Enter the **Qty** of each **Equipment/Materials Code** that is available at the training facility.

Per Unit Cost Enter a **Per Unit Cost** for each item. Though this field is optional, it's helpful as a reference, especially when you compare facility site costs.

Indicate the currency code in the field next to **Per Unit Cost**. The default currency code is from the value specified in the BUS_UNIT_OPR_HR record, EXCHNG_TO_CURRENCY field. You can override this value if you want. Valid prompt values to enter a different currency code are from the Currency Code Table.

Cost Unit Select a **Cost Unit** associated with the item. Valid values are in the Cost Unit Table.



Note. Cost information isn't required on this page, and you need to establish costs for training facilities only if you are working with Training Budgets.

Training Facility Table - Training Rooms Page

Usage	Use the Training Rooms page to track the following information about each training room at a training facility: location of the training room, capacity, cost of room, and the fixed equipment available in the room.
Object Name	TRN_FACILITY_TBL4
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Training Facility Table, Training Rooms • Develop Workforce, Administer Training (USF), Setup, Training Facility Table, Training Rooms • Develop Workforce, Budget Training (GBL), Setup, Training Facility Table, Training Rooms
Prerequisites	To track the equipment that is available in a training room, you must

	first set up the Equipment and Materials Table.
Access Requirements	Enter a Training Facility code.

Training Facility Table - Training Rooms page

The system displays the **Training Facility**, **Business Unit**, and **Location** that you selected. These fields are for information only.

Training Rooms

- Room Code** Enter a **Room Code** for the room. Rooms within a training facility must have a unique **Room Code**.
- Room** Enter the **Room** name.
- Building #** (building number) Enter the name or number of the **Building** in which the room is located.
- Floor #** (floor number) Enter the number of the **Floor** on which the room is located.
- Per Unit Cost** Enter a **Per Unit Cost** for the room.
- Cost Unit** Select the **Cost Unit** associated with the **Per Unit Cost**. Valid values are in the Cost Unit Table.



Cost information isn't required on this page, and you need to establish costs for training facilities only if you are working with Training Budgets.

- Maximum Nbr of Students** (maximum number of students) Enter the **Maximum Nbr of Students** that can be accommodated in the room. When you set up a course session, the system checks this field to determine whether the room is large enough for the selected course.
- Room Active** Clear the **Room Active** check box if the training room isn't available for training. You can schedule sessions in a room only if **Room Active** is selected.
- Fixed Equipment/Materials**
- Equip Code** (equipment code) Select an **Equip Code** for each item in the training room. Include only fixed equipment that is tied to the room. Use the Training Facility Table - Contacts and Equipment Page to list equipment that is shared by rooms in the training facility.
- When you move out of the **Equip Code** field, the system displays the equipment name. You define these values in the Equipment and Materials Table.
- Quantity** Enter the **Quantity** of each item in the training room.

Training Facility Table - Directions Page

Usage	Use the Directions page to store directions to a training facility.
Object Name	TRN_FACILITY_TBL3
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Training Facility Table, Directions • Develop Workforce, Administer Training (USF), Setup, Training Facility Table, Directions • Develop Workforce, Budget Training (GBL), Setup, Training Facility Table, Directions
Prerequisites	None.
Access Requirements	Enter a Training Facility code.

Address		Contacts and Equipment		Training Rooms		Directions	
Training Facility:	KUFAC1	Corporation Headquarters					
Business Unit:	GBIBU	Global Business Institute BU					
Description:	Corporation Headquarters						
Directions							
From the Airport, take the shuttle bus to George Washington Parkway.							

Training Facility Table - Directions page

The system displays the **Training Facility** you selected, the **Business Unit** associated with the facility, and a **Description** of the facility. These fields are for information only.

Directions

Directions

Enter **Directions** to the facility in the space provided. You can use the directions you enter here in the confirmation form letters that you send to students.



For more information about producing training letters, see *Generating Administer Training Letters*.

Setting Up Course Instructors

To help you set up course sessions, you can enter information about internal and external instructors in the Instructor Table. You can track instructor costs and areas of expertise. To help you pick the right teachers for course sessions, you can compare course instructor requirements against an instructor’s own competency profile before deciding whether the instructor is qualified to teach that course.

The Instructor Table consists of two pages. On the first page, you enter information related to the instructor’s area of expertise. On the second page, you select the courses that the instructor is qualified to teach.

Instructor Table - Instructor Profile Page

Usage	Use the Instructor Profile page to add an instructor to the Instructor
-------	--

	Table. You can add employees and non-employees to the Instructor Table.
Object Name	TRN_INSTRUCTR_TBL1
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Instructor Table, Instructor Profile • Develop Workforce, Administer Training (USF), Setup, Instructor Table, Instructor Profile • Develop Workforce, Budget Training (GBL), Setup, Instructor Table, Instructor Profile
Prerequisites	You can add only an existing employee or non-employee to the Instructor Table. To add a new external instructor, first add the instructor as a non-employee, using the Add Non-Employee option on the Administer Workforce menu.
Access Requirements	Enter an Instructor ID.

The screenshot shows the 'Instructor Profile' page with a 'Qualification' tab selected. The fields are as follows:

- Instructor ID:** KC0015 Campbell, Barry Robert
- *Internal/External:** Internal (dropdown menu)
- Vendor ID:** (empty text box)
- School Code:** (empty text box)
- School Name:** (empty text box)
- Per Unit Cost:** 750.00 (text box) with a 'CAD' icon and a search icon.
- Cost Unit:** Day (dropdown menu)
- Area of Expertise:** Corporate/Management/Executive (text box)
- Description:** Covers a wide range of training, from corporate orientation through to management training. (text area)

Instructor Table - Instructor Profile page

The system displays the **Instructor ID** that you selected. This field is for information only.

Internal/External

This is a display-only field. The system populates the **Internal/External** field as follows:

Internal if the instructor is an employee.

External if instructor is a non-employee.

Vendor ID

If the instructor works for a vendor you've added to the Vendor Table, select a **Vendor ID**. The system makes this field unavailable for entry if the instructor is *Internal*.

- School Code** If the instructor works at a school you've added to the School Table, select a **School Code**. When you move out of the field, the system enters the **School Name**. To enter a school that isn't in the School Table, leave **School Code** blank.
- The system makes the **School Code** field unavailable for entry if the instructor is **Internal**.
- School Name** If the instructor works at a school that isn't set up in the School Table, enter the **School Name**.
- The system makes the **School Name** field unavailable for entry if the instructor is **Internal**.
- Per Unit Cost** Enter the **Per Unit Cost** for this instructor. This value is used as the default instructor cost within the course cost set up. If the instructor is **Internal**, the system defaults the cost for the instructor from the Employee Training Cost Page in the Budget Training menu.
- Cost Unit** Select a **Cost Unit** for the instructor's time from the available options. Cost units are stored on the Cost Unit Table.



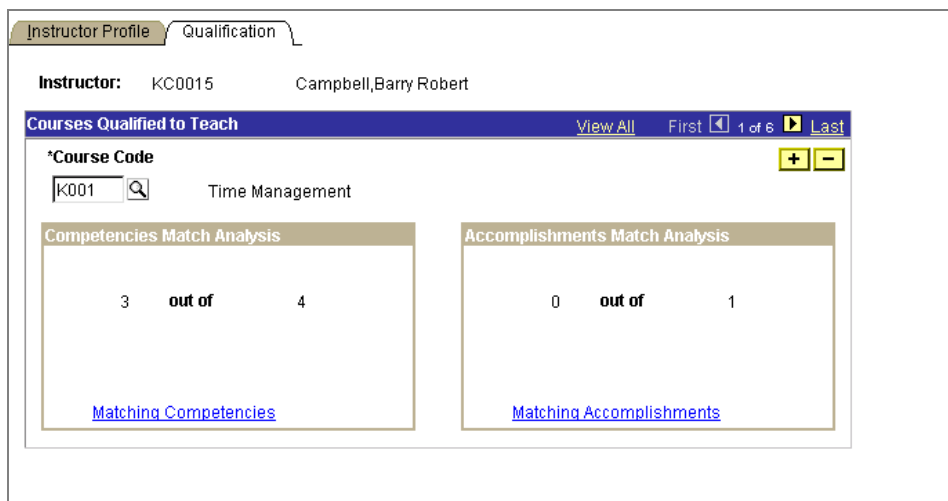
Cost information isn't required on this page, and you need to set up costs for instructors only if you are working with Budget Training.

- Area of Expertise** Enter a brief description of the instructor's **Area of Expertise**.
- Description** Use this field to enter any further comments about the instructor's **Area of Expertise**. You don't need to specify the courses that the instructor teaches: these are added to the Qualification page.

Instructor Table - Qualification Page

Usage	<p>Use the Qualification page to define the courses that an instructor is qualified to teach. When you schedule a course session, the system uses the information on this page to determine which instructors are able to teach the selected course.</p> <hr/> <p>For more information about setting up course sessions, see "Administering Course Sessions".</p> <hr/>
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Object Name	TRN_INSTRUCTR_TBL2
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Instructor Table, Qualification • Develop Workforce, Administer Training (USF), Setup, Instructor Table, Qualification • Develop Workforce, Budget Training (GBL), Setup, Instructor Table, Qualification
Prerequisites	<p>Using the Qualification page, you can compare course competencies and accomplishments with the selected instructor’s competency profile. If you want to use this functionality to match instructors to courses, you need to define the following before you can use this page:</p> <p>Course requirements. Instructor competencies and accomplishments are set up in the Course Table.</p> <p>Instructors’ competencies and accomplishments. This is explained in Tracking Worker Competencies and Accomplishments.</p>
Access Requirements	Enter an Instructor ID.



Instructor Table - Qualification page

The system displays the **Instructor** ID and instructor’s name. These fields are for information only.

Courses Qualified to Teach

Course Code Select the **Course Code** from the list of valid values. When you move out of this field, the system displays the course title and compares the course requirements with the instructor’s competencies and accomplishments. The results of this comparison appear in the **Competencies Match Analysis** and **Accomplishments Match Analysis** group boxes.

If the instructor is qualified to teach the course, add the course to the instructor’s profile.

Competencies Match Analysis

The **Competencies Match Analysis** group box shows how many of the instructor’s competencies match course competency requirements. If you haven’t set up course competency requirements, the system displays **0 out of 0** in this group box.

Matching Competencies Click **Matching Competencies** to display the Qualification: Matching Competencies Page. This page lists all the competencies required by the course alongside the instructor’s competencies.

Accomplishments Match Analysis

The **Accomplishments Match Analysis** group box shows how many of the instructor’s accomplishments match course accomplishment requirements. If you haven’t set up course accomplishments, the system displays **0 out of 0** in this group box.

Matching Accomplishments Click **Matching Accomplishments** to display the Qualification: Matching Accomplishments Page. This page lists the accomplishments required by the course alongside the instructor’s accomplishments.

Qualification: Matching Competencies Page

Usage	Use the Matching Competencies page to view all of the instructor’s competencies, along with the course requirements. For some courses, you may not need the instructor to fulfill all the requirements, and this page helps you to decide on the instructor’s suitability to teach the course.
Object Name	TRN_MTCH_CMPS_SEC
Navigation	To access this page, click Matching Competencies on the Instructor Table - Qualification Page.

Matching Competencies																																																			
<table border="1"> <thead> <tr> <th>Instructor Competencies</th> <th>View All</th> <th>First</th> <th>1-4 of 6</th> <th>Last</th> </tr> </thead> <tbody> <tr> <td>Ability to transfer knowledge</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Communication Skills</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>PeopleCode</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>PeopleTools</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Instructor Competencies	View All	First	1-4 of 6	Last	Ability to transfer knowledge					Communication Skills					PeopleCode					PeopleTools					<table border="1"> <thead> <tr> <th>Competencies Match Analysis</th> <th>View All</th> <th>First</th> <th>1-4 of 4</th> <th>Last</th> </tr> </thead> <tbody> <tr> <td>Effectively manages own time</td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Ability to transfer knowledge</td> <td></td> <td></td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Communication Skills</td> <td></td> <td></td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Training</td> <td></td> <td></td> <td></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	Competencies Match Analysis	View All	First	1-4 of 4	Last	Effectively manages own time				<input type="checkbox"/>	Ability to transfer knowledge				<input checked="" type="checkbox"/>	Communication Skills				<input checked="" type="checkbox"/>	Training				<input checked="" type="checkbox"/>
Instructor Competencies	View All	First	1-4 of 6	Last																																															
Ability to transfer knowledge																																																			
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PeopleCode																																																			
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Communication Skills				<input checked="" type="checkbox"/>																																															
Training				<input checked="" type="checkbox"/>																																															
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Qualification: Matching Competencies page

Instructor Competencies

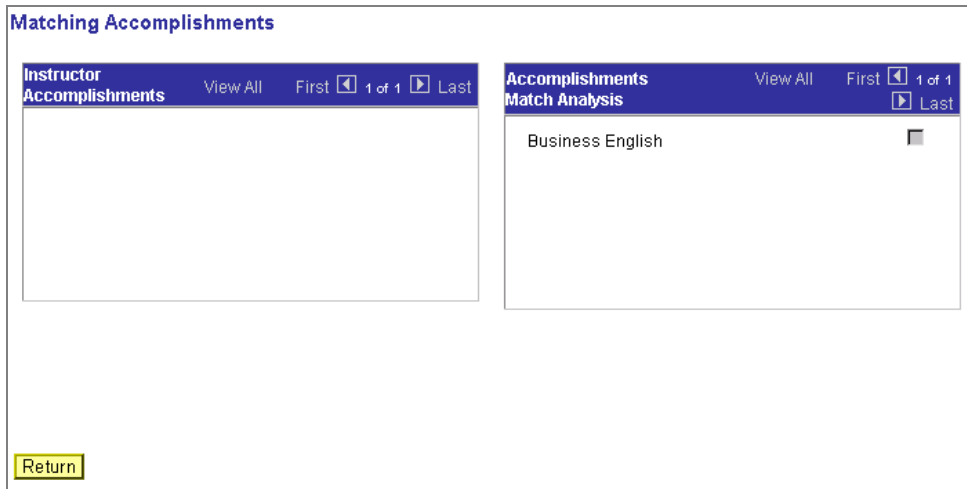
The **Instructor Competencies** group box lists the competencies that are assigned to the instructor from the Competencies - Competency Assignment Page.

Competencies Match Analysis

The **Competencies Match Analysis** group box lists the competencies that are required to teach the course. You set up these course requirements on the Course Table - Required Instr Comps/Accomps Page. The system automatically selects the check box if the competency is included in the instructor's profile.

Qualification: Matching Accomplishments Page

Usage	Use the Matching Accomplishments page to view all of the instructor's accomplishments, along with the course requirements. For some courses, you may not need the instructor to fulfill all the requirements, and this page helps you to decide on the instructor's suitability to teach the course.
Object Name	TRN_MTCH_ACPS_SEC
Navigation	To access the page, click Matching Accomplishments on the Qualification page.



Qualification: Matching Accomplishments page

Instructor Accomplishments

The **Instructor Accomplishments** group box lists the instructor's accomplishments. These are set up in Manage Competencies.

Accomplishments Match Analysis

The **Accomplishments Match Analysis** group box lists the accomplishments that are required to teach the course. You set up these course requirements on the Course Table - Required Instr Comps/Accomps Page. The system automatically selects the check box if the accomplishment is included in the instructor's profile.

Setting Up Course Categories

Courses can cover a wide range of subjects, from administrative to technical and from management to personal. To help you organize your training courses, you set up categories and subcategories on the Category/Subcategory Table Page. When you create new courses in the Course Table you associate the course with a category and subcategory. If you need to reorganize your training catalog, use Catalog Organization Page to move courses between categories and subcategories.

Overview of Categories and Subcategories

In order to be clear about courses and the scope covered by each course, you can classify each course into categories. These categories can be further classified into subcategories, to enable you to define more discrete components of training as required by your employees. This structure of courses, categories, and subcategories provides you with an organizational approach to your training courses, which enables you to better manage your employee training requirements.

The following example shows how PeopleTools courses 1 and 2 have been classified as Technical courses within the Human Resources Category area. Likewise, Supervisory Skills and

Performance Reviews courses are classified as Administrative courses in the same category. All the courses have been added to the catalog.

Category	Subcategory	Courses	Catalog Status
Human Resources	Technical	PeopleTools 1	Active
		PeopleTools 2	Active
	Administrative	Supervisory Skills	Active
		Performance Reviews	Active

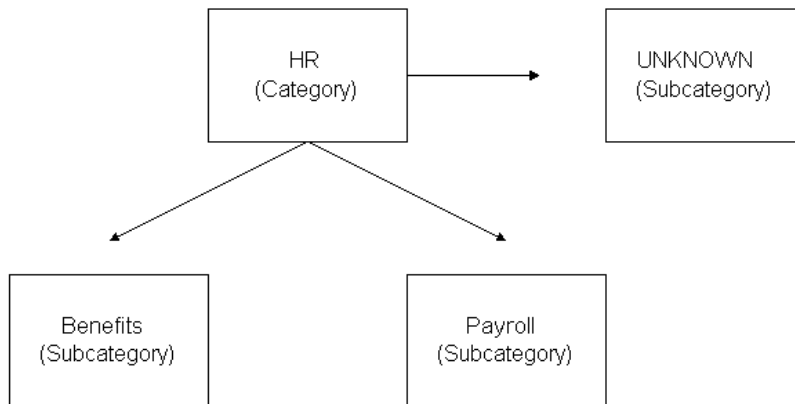
When you create a new category, the system defaults to the Subcategory Code value of **UNKNOWN**. Use the **UNKNOWN** subcategory to assign courses to a category that you don't want to divide into subcategories. This enables you to limit your catalog structure to a *single* category level. The Subcategory Code field value is display-only, but you can modify the description fields.



This means that every category you define will automatically have an **UNKNOWN** subcategory associated with it.

The **UNKNOWN** subcategory is at the same level as the Category, for default purposes. For example, on the Catalog Cost Table, you can populate the table with any courses that are tagged with a category and subcategory value that you identify. This enables you to specify the costs that are associated with similar courses quickly, without having to enter them into the Catalog Cost Table one at a time.

The following diagram illustrates the hierarchical structure of categories and subcategories in the training module that you'll see as you associate specific course codes with categories and subcategories in the Training Administration module:



Hierarchical structure of categories and subcategories

You can default values entered for the Unknown subcategory into other subcategories. For example, in the diagram shown here, the values entered into the Unknown subcategory within the HR Category can be defaulted into the Benefits and Payroll subcategories.

Category/Subcategory Table Page

Usage	Use the Category/Subcategory Table page to define the course categories that form your training catalog.
Object Name	TRN_CATEGORY_TABLE
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Category / Subcategory, Category Table • Develop Workforce, Administer Training (USF), Setup, Category / Sub-category, Category Table • Develop Workforce, Budget Training (GBL), Setup, Category / Subcategory, Category Table
Prerequisites	None
Access Requirements	Enter a Category Code.

Category Table

Category Code: HUMRES

*Description: Human Resources

Short Description: Human Res

Category Table			View All	First	1-4 of 4	Last
Description		Duration/Capacity				
*Subcategory Code	*Description	Short Description				
BENEFITS	Benefits	Benefits	+	-		
NEW HIRE	New Hire	New Hire	+	-		
RECR&STAFF	Recruitment and Staffing	Recr&Staff	+	-		
UNKNOWN	Unknown	Unknown	+	-		

Category/Subcategory Table: Description page



Multiple views of this page are available by clicking the tabs in the scroll area. We document the fields that are common to all views first.

Common Page Information

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Description, Short Description.**

Description Tab

See the previous screen shot for a view of this tab.

Enter the **Subcategory Code** and a **Description** for the subcategory. Enter an abbreviated description in **Short Description**. Add a row for each subcategory that you want to add to the category.

Duration/Capacity Tab

*Subcategory Code	Duration Time	Unit	Min Students	Max Students		
BENEFITS		Hour			+	-
NEW HIRE		Hour			+	-
RECR&STAFF		Hour			+	-
UNKNOWN		Hour			+	-

Category/Subcategory Table: Duration/Capacity page

Enter the category **Duration Time** for the allocated course and the associated **Unit** of time.

Enter the **Min Students** (minimum number of students) and the **Max Students** (maximum number of students) allowed in the course session.



The system uses the **Duration Time**, **Unit**, **Min Students**, and **Max Students** values as defaults when you define session costs later.



For more information about catalogs, see [Setting Up Your Training Catalog and Training Programs](#).

Setting Up Training Courses

Use the Course Table to set up the following information about the training courses that you want to track:

- General course information, such as course type, minimum and maximum number of students, and course duration.
- Course prerequisites.
- Competencies and accomplishments required to teach the course.
- Target competencies and accomplishments.


- Standard equipment and materials required to administer courses.

Once you set up courses, you can set up training programs, schedule course sessions (if you chose to administer sessions in-house), and track employee training. You can also use course codes for tracking the external courses that your employees frequently attend, such as classes offered at a local college or trade association seminars.

To view a list of standard courses already defined in the system, generate the Course Table report. This report shows all available courses and includes a description of each, whether it is internal or external to your organization, the location, and duration of the course.

Course Table - Course Profile Page

Usage	Use the Course Profile page to define general course information.
Object Name	COURSE_TABLE1_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Table, Course Profile • Develop Workforce, Administer Training (USF), Setup, Course Table, Course Profile • Develop Workforce, Budget Training (GBL), Setup, Course Table, Course Profile • Develop Workforce, Manage Competencies (GBL), Setup, Course Table, Course Profile • Develop Workforce, Manage Competencies (USF), Setup, Course Table, Course Profile
Prerequisites	None.
Access Requirements	Enter the Course Code.

Course Profile		Required Instr Comps/Accomps	Prereqs,Goals	Equipment	Catalog	Description
Course:	K001					
Title:	Time Management					
Short Title:	Time Mgmt	*Course Status:	Active			
Creation Date:	01/01/1980	Revision Date:				
*Internal/External:	Internal	<input checked="" type="checkbox"/> Session Administration				
*Course Type:	Skill Dev	<input checked="" type="checkbox"/> Multilingual Course				
*Primary Delivery Method:	Instructor	<input checked="" type="checkbox"/> Instructor Comps/Accomps Req				
Min/Max Students:	5 10	Cost Unit:	Day			
Duration Time:	2.0	Course Offering:	Quarterly			
Course Units:	1.0					
School Code/School:						
 France						
<input type="checkbox"/> Chargeable						

Course Table - Course Profile page

The system displays the **Course** code you selected. This field is for information only.

Title Enter the **Title** of the course.

Short Title Enter an abbreviated course title in the **Short Title** field.

Course Status Select a **Course Status** from the available options:

Active: Select this status for courses that you currently offer. You can set up a course session only if the Course Status is Active. This is the default status.

Inactive: Select this status for courses that you no longer offer. You can't set up a course session for courses that are Inactive.

Proposed: Select this status for courses that aren't yet available. You can't set up a session for courses that are Proposed.

Creation Date If you're setting up a new course, the **Creation Date** defaults to the system date, usually today's date, which you can change if necessary.

Revision Date Enter a **Revision Date** when you make changes to an existing course.

Internal/External Select **Internal**, if the course is held in-house, or **External**, if the course is held off-site.

Session Administration

Select the **Session Administration** check box if you plan to administer course sessions within your organization using PeopleSoft Human Resources. With Session Administration selected, you can create course sessions, set up waiting lists, enroll students in courses, and send out form letters.

You can select **Session Administration** for both *Internal* and *External* courses.

Note. If you can't find a session when you're administering course sessions in the Administer Training module, check the Course Table to see if the Session Administration check box is selected for the Course Code that the session is associated with, or check to see if the course session is active.

Course Type

Select a **Course Type** from the available options:

Contin Ed (continuing education)

Comp check (competency check)

Functional

Mgmt Devel (management development)

Skill Dev (skill development)

Supv Skill (supervisory skills)

Technical

Use **Course Type** to categorize your courses. This field is for information only and doesn't affect the way you administer the course in PeopleSoft Human Resources.

Multilingual Course

Select the **Multilingual Course** check box if the course is offered in multiple languages. The system makes the **Multilingual Course** check box available if you select the **Session Administration** check box.

Primary Delivery Method

Select the **Primary Delivery Method** from the available options:

Audio: Select this option for audio training, such as language tapes.

Computer: Select this option for computer-based training.

Instructor: Select this option for courses that are instructor led. This is the default **Primary Delivery Method**.

On-the-Job: Select this option where you offer on-the-job training.

Video: Select this option for training videos.

Workbook: Select this option for self-taught courses with workbooks.

Instructor Comps/Accomps Req (competencies /accomplishments required)

Select the **Instructor Comps/Accomps Req** check box if you want to define a set of instructor competencies and accomplishments for the course. You define the competencies and accomplishments on the Required Instr Comps/Accomps page.

The system makes this check box unavailable if the **Primary Delivery Method** isn't **Instructor**.

Min/Max Students

To limit enrollment for the course, enter the minimum and maximum number of students that can enroll in the course.

Duration Time

Enter the duration of the course.

Cost Unit

If you completed the **Duration Time** field, select a **Cost Unit** from the available options. This is the unit in which **Duration Time** is measured:

Hour

Day

Week

Month

Year

These values are stored on the Cost Unit Table.

Course Units

If the course is external to your organization, such as at a college or university, enter the number of **Course Units**.

Course Offering

Select a frequency to indicate how often the course is offered.

School Code/School

If the course is *Internal*, the system makes these fields unavailable for entry.

If the course is *External*, enter details of the school in **School Code** or **School**.

If you have set up a **School Code** for the school, select the code from the available options. When you move out of the field, the system completes the **School** name and makes the field unavailable. If the school doesn't have a code, leave **School Code** blank, and enter the school name in **School**. You create **School Codes** in the School Table.

France

For French organizations only, use the **France** group box to indicate whether a course is a chargeable item.

Chargeable

Select the **Chargeable** check box to make the training course a chargeable item. This enables all expenses entered against this Expense Type to be chargeable. This is used to meet the French legal reporting requirements.



For more information about the French 2483 legal reporting requirement, see Producing the French Training Report 2483.

Course Table - Required Instr Comps/Accomps Page

Usage	Use the Required Instr Comps/Accomps page to define competencies and accomplishments that instructors need to teach the course. When you add an instructor to the Instructor Table, you can compare the instructor's competency profile with the course requirements before you add the course to the instructor's profile.
Object Name	COURSE_TABLE6
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Table, Required Instr Comps/Accomps • Develop Workforce, Administer Training (USF), Setup, Course Table, Required Instr Comps/Accomps • Develop Workforce, Budget Training (GBL), Setup, Course Table, Required Instr Comps/Accomps • Develop Workforce, Manage Competencies (GBL), Setup, Course Table, Required Instr Comps/Accomps

	<ul style="list-style-type: none"> • Develop Workforce, Manage Competencies (USF), Setup, Course Table, Required Instr Comps/Accomps
Prerequisites	<p>Before you can use this page, you must have competencies and accomplishments tables set up.</p> <p>You must select the Instructor Comps/Accomps Req check box on the Course Profile page to make the fields on the Required Instr Comps/Accomps page available for entry.</p>
Access Requirements	Enter the Course Code.

The screenshot displays the 'Required Instr Comps/Accomps' page. At the top, there are tabs for 'Course Profile', 'Required Instr Comps/Accomps', 'Prereqs,Goals', 'Equipment', 'Catalog', and 'Description'. Below the tabs, the course information is shown: 'Course: K001 Time Management' and 'Status: Active'. The 'Instructor Competencies' section has a header bar with 'View All', 'First', '1-4 of 4', and 'Last' navigation options. It contains a table with four rows, each with a competency ID in a searchable field, a description, and a +/- button. The 'Instructor Accomplishments' section has a similar header with 'View All', 'First', '1 of 1', and 'Last' options, and one empty row with a search icon and a +/- button.

Course Table - Required Instr Comps/Accomps (required instructor competencies/ accomplishments) page

The system displays the **Course** you selected and the course **Status**. These fields are for information only.

Instructor Competencies

Competency

Select a **Competency** that you want to add to the instructor requirements, from the list of valid values. You set up Competencies on the Competency Table.

Instructor Accomplishments

Accomplishment

Select an **Accomplishment** that you want to add to the instructor requirements, from the list of valid values.



For more information about setting up competencies and accomplishments see Setting Up Competencies and Accomplishments.

Insert additional rows, to add further competencies and accomplishments.

Course Table - Prereqs, Goals Page

Usage	Use the Prereqs, Goals page to designate the courses students should complete before taking this course and to specify targeted skills and certifications.
Object Name	COURSE_TABLE2
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Table, Prereqs,Goals • Develop Workforce, Administer Training (USF), Setup, Course Table, Prereqs,Goals • Develop Workforce, Budget Training (GBL), Setup, Course Table, Prereqs,Goals • Develop Workforce, Manage Competencies (GBL), Setup, Course Table, Prereqs,Goals • Develop Workforce, Manage Competencies (USF), Setup, Course Table, Prereqs,Goals
Prerequisites	Define Prerequisite Courses and Target Competencies.
Access Requirements	Enter a Course Code.

Course Profile	Required Instr Comps/Accomps	Prereqs,Goals	Equipment	Catalog	Description
Course: K001 Time Management		Status: Active			
Prerequisite Courses					First 1 of 1 Last
K002 Corporate Orientation					+ -
Target Competencies					First 1-3 of 3 Last
Competency		*Proficiency		Grant to EE after Course	
0110 Ability to manage own time		3 Good		<input checked="" type="checkbox"/>	+ -
4014 Multi-Tasking		3 Good		<input checked="" type="checkbox"/>	+ -
4015 Planning & Scheduling		3 Good		<input checked="" type="checkbox"/>	+ -
Target Accomplishments					First 1 of 1 Last
*License/Certification Code			Grant to EE after Course		
			<input checked="" type="checkbox"/>		+ -
Target Languages					First 1 of 1 Last
*Language	Speak	Read	Write	Grant to EE after Course	
				<input checked="" type="checkbox"/>	+ -

Course Table - Prereqs, Goals (prerequisites, goals) page

The system displays the **Course** you selected and the course **Status**. These fields are for information only.

Prerequisite Courses

Select course codes for **Prerequisite Courses**. Before you can select courses as prerequisites for other courses, you have to create them using the Course Table. To save yourself time, enter the most basic courses first, and then work your way up to the courses requiring prerequisites.



You can't enter a course as a prerequisite for itself; if you do, the system will issue an error message.

Target Competencies

To specify course objectives, you can select **Target Competencies**, which you create in the Competency Table. Select the **Grant to EE after Course** (grant to employee after course) check box if you want the system to update the employees' competencies profiles automatically when they complete the course.



For more information about competencies, see Before You Begin.

You can also establish a default **Proficiency** level that a student should receive for a competency upon completing the course. For example, a beginner's course in a competency might give a rating of *Fair*, while completing an advanced level course warrants a proficiency level award of

Expert. If you selected the **Grant to EE after Course** check box, the system adds the competency to the employee’s profile and sets the proficiency rating to the level you enter here. Competencies that are automatically assigned to an employee’s profile are given an evaluation type of *Approved*.

Target Accomplishments

If students are awarded a license/certification on completion of the course, select a **License/Certification** code from the list of valid values. You define **License/Certification** codes in the License/Certification Table. Select the **Grant to EE after Course** check box if you want the system to update the employees’ accomplishments profiles when they complete the course.

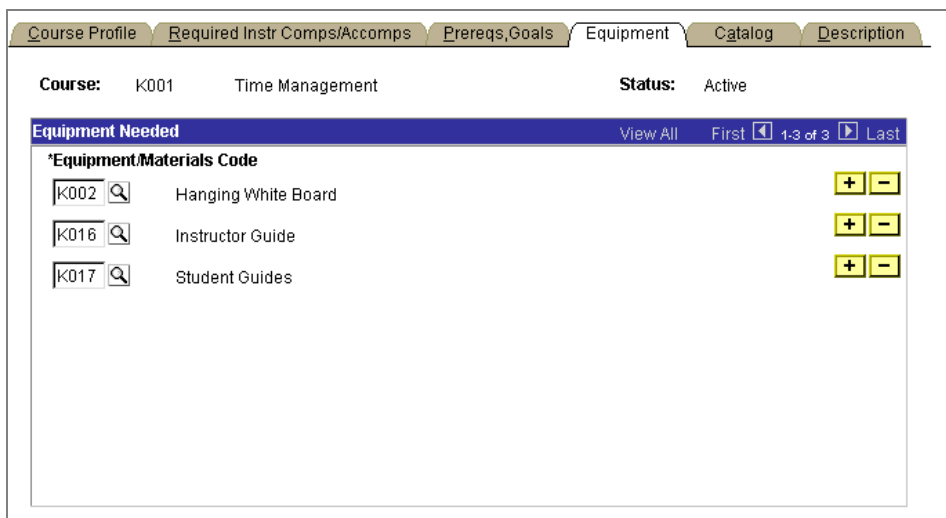
Target Languages

To specify languages that a student learns by taking this course, select a **Language** from the list of valid values. You define **Language** codes in the Language Table. In the **Speak, Read,** and **Write** fields, select *High, Moderate,* or *Low* to indicate the level of proficiency that you expect students to achieve on completion of the course.

Select the **Grant to EE after Course** check box if you want the system to update the employees’ accomplishments profiles with the language and proficiency when they complete the course.

Course Table - Equipment Page

Usage	Use the Equipment page to define the equipment and materials that are required for the course. You’ll probably want to add this information only for courses that you administer in-house.
Object Name	COURSE_TABLE3
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Table, Equipment • Develop Workforce, Administer Training (USF), Setup, Course Table, Equipment • Develop Workforce, Budget Training (GBL), Setup, Course Table, Equipment • Develop Workforce, Manage Competencies (GBL), Setup, Course Table, Equipment • Develop Workforce, Manage Competencies (USF), Setup, Course Table, Equipment
Prerequisites	Before you can use this page, you must define Equipment/Materials codes on the Equipment/Materials Table.
Access Requirements	Enter a Course Code.



Course Table - Equipment page

The system displays the **Course** you selected and the course **Status**. These fields are for information only.

Equipment Needed

Select the standard **Equipment/Materials Code** needed for the course from the list of valid values.

Insert additional rows, to add as many pieces of equipment as necessary.



For more information about setting up Equipment and Materials Codes, see [Setting Up Training Equipment and Facilities](#).

Course Table - Catalog Page

Usage	Use the Catalog page to specify how you want your courses to be classified in the system.
Object Name	COURSE_TABLE4
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Table, Catalog • Develop Workforce, Administer Training (USF), Setup, Course Table, Catalog • Develop Workforce, Budget Training (GBL), Setup, Course Table, Catalog • Develop Workforce, Manage Competencies (GBL), Setup, Course Table, Catalog

	<ul style="list-style-type: none"> • Develop Workforce, Manage Competencies (USF), Setup, Course Table, Catalog
Prerequisites	None
Access Requirements	Enter a Course Code.

Course Table - Catalog page

The system displays the **Course** you selected and the course **Status**. These fields are for information only.

Select the **Not in Catalog** check box if you don't want to include the course in your course catalog. Placing courses in a catalog is a way of organizing all of your training courses into an easily managed, understandable structure that will help you administer courses more efficiently, especially if your organization manages a large number of diverse courses for its workforce. If you select this check box, the system makes the **Category** and **Subcategory Code** fields unavailable for entry.



If you've already specified a category or subcategory for a course, and you select the **Not in Catalog** check box, the system clears any category or subcategory information on the page. If you select the check box again later, you will have to specify the course category again.

Catalog

If you choose to add this course to the catalog, select a **Category Code** and **Subcategory Code** from the list of valid values. You create categories and subcategories on the Category/Subcategory Table Page. Categories define training subjects, and subcategories allow for a more specific definition of the subject matter.

Insert a new data row, to add the course to a different category in the catalog.

Course Table - Description Page

Usage	Use the Description page to enter additional information about the course content, target audience, or course agenda.
Object Name	COURSE_TABLE5
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Table, Description • Develop Workforce, Administer Training (USF), Setup, Course Table, Description • Develop Workforce, Budget Training (GBL), Setup, Course Table, Description • Develop Workforce, Manage Competencies (GBL), Setup, Course Table, Description • Develop Workforce, Manage Competencies (USF), Setup, Course Table, Description
Prerequisites	None
Access Requirements	Enter a Course Code.

Course Profile Required Instr Comps/Accomps Prereqs,Goals Equipment Catalog Description

Course: K001 Time Management Status: Active

Description Type View All First 1 of 2 Last

Type: General + -

Description View All First 1 of 1 Last

*Effective Date: 01/01/1980 + -

Description: This two day program is designed to help you learn to become a better manager of your time. Simple, easy to use solutions are provided to assist in learning to actually manage your time rather than working longer days. This workshop includes an assessment that covers the major categories of time management and helps you discover present strengths in managing time and identify opportunities for improving time management skills.

Course Table - Description page

Description Type

Select a description **Type** to show the type of information that you want to add. For example, you could add a full description of the appropriate Audience for this course. The valid options are: *Agenda, Contents, Audience, and General.*

Description

Enter an **Effective Date** and a **Description** for the selected **Description Type**.

The Course Table Report (PER703) prints only the *current* descriptions that you enter on this page.



The **Effective Date** on this page applies only to the **Description**. It doesn't apply to the entire course definition.

Setting Up Your Training Catalog and Training Programs

With the Catalog Organization page, you can examine and adjust your category/subcategory course organization structure. Doing so helps you organize your training courses by course categories, which in turn makes managing large and diverse training programs an easier task.

Use the Training Program Table Page to group courses into logical progressions. You can then associate standard training programs with job codes in the Job Code Table, which you'll find particularly helpful when using the PeopleSoft career planning functionality—when you set up training and development programs for employees, you can choose to use the default training program for their job codes.



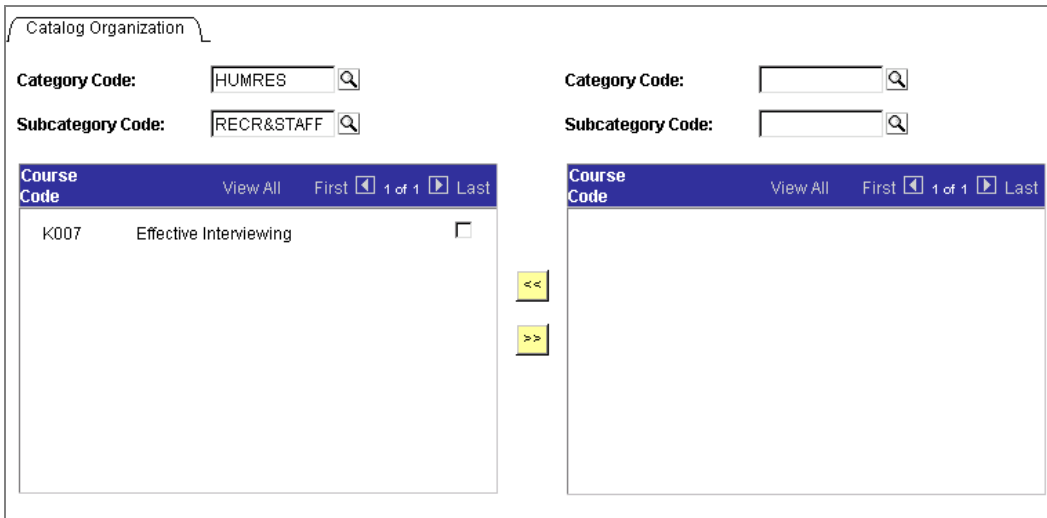
For more information about the Job Code Table, see Setting Up Control Tables.

Catalog Organization Page

Usage	Use the Catalog Organization page to view courses that are associated with a selected category and subcategory. From here you can easily reorganize your training catalog, by moving courses between categories or subcategories.
Object Name	TRN_CATALOG_MOVE
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Catalog Organization, Catalog Organization • Develop Workforce, Administer Training (USF), Setup, Catalog Organization, Catalog Organization • Develop Workforce, Budget Training (GBL), Setup, Catalog Organization, Catalog Organization

Prerequisites	Before you can use this page, you must set up your Category and Subcategory codes on the Category/Subcategory Table Page.
Access	Enter a Category and Subcategory Code

Requirements



Catalog Organization page

To view the courses in a selected subcategory, select the **Category Code** and **Subcategory Code** in the left or right column. When you move out of the **Subcategory Code** field, the system lists the courses in that subcategory. If you want to move any courses out of that subcategory, select the check box next to the course name.

In the other column, select the **Category Code** and **Subcategory Code** into which you want to move the selected course. When you move out of the **Subcategory Code** field, the system lists the courses in the target subcategory.

Use one of these buttons to move the selected course to the target subcategory:



Click the **Right Arrow** button to move selected courses from the category in the left column to the category in the right column.



Click the **Left Arrow** button to move selected courses from the category in the right column to the category in the left column.

Training Program Table Page

Usage	Use the Training Program Table page to create a training program.
Object Name	TRN_PROGRAM_TABLE
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Training Program Table, Training Program Table • Develop Workforce, Administer Training (USF), Setup, Training Program Table, Training Program Table

	<ul style="list-style-type: none"> • Develop Workforce, Manage Competencies (GBL), Setup, Training Program Table, Training Program Table • Develop Workforce, Manage Competencies (USF), Setup, Training Program Table, Training Program Table • Develop Workforce, Plan Careers, Setup, Training Program Table, Training Program Table
Prerequisites	Before you can create a training program, you must set up the courses that make up that program on the Course Table.
Access Requirements	Enter a Training Program code.

Training Program Table

Program Code: KEXEC

***Pgm Status:** Active

***Description:** Executive Development **Short Title:** Executive

Creation Date: 01/01/1980 **Revision Date:**

Business Unit: GBIBU Global Business Institute BU

Owning Dept ID: KC001 Human Resources

Comment: This program is intended to provide employees with the basic skills to perform a management role.

Training Program				View All	First	1-3 of 3	Last
Sequence	*Course Code	Description	Required				
1	K010	Leadership Skills for Managers	<input checked="" type="checkbox"/>	+	-		
2	K012	Project Management	<input type="checkbox"/>	+	-		
3	K006	Conducting Performance Reviews	<input type="checkbox"/>	+	-		

Training Program Table page

The system displays the **Program Code** you selected. This field is for information only.

Select the **Pgm Status** (program status) from the following valid options: *Active* (this is the default), *Inactive*, and *Proposed*.

Enter a description of the training program in the **Description** field and an abbreviated description in the **Short Title** field.

The **Creation Date** defaults to the system date, usually today’s date, which you can change if necessary. If you decide to update the program at a later time, enter a **Revision Date**.

Select the **Business Unit** that you want to associate with this training program. Based on the **Business Unit** you selected, select the **Owning Dept ID**—the department that is responsible for maintaining the training program. You define department codes in the Department Table.



For more information about how business units impact your human resources system, see Regulating HRMS System Data.

Training Program

Select a **Course Code** for each course in the training program. You define course codes in the Course Table. Select the **Required** check box if the course is mandatory.

The system sorts courses by course code. If you want them to appear in a different order, enter **Sequence** numbers to define the order in which students should take courses.

To view the new order, save your changes and close the page. When you open this page again, the courses will appear in the new order.

Setting Up Non-Course Training

Because not all training involves taking a course or attending a class, you may need to establish Training IDs for the many other forms that training can take, such as multimedia CD-ROM presentations, videos, or self-paced training guides.

Use the Non-Course Training Table to track training that isn't course-based.



For more information about setting up non-course training, see [Managing Competency Training](#).

CHAPTER 3

Setting Up Training Costs

Once you've set up your training tables for vendors, instructors, training facilities, and equipment and defined course codes and training programs, you're ready to set up training costs for your organization.

In this section, we discuss each aspect of your setup so that you can create an effective training budget. We enable you to capture each cost associated with training, so your budget is as detailed as you need. You and others in your organization can then use your budget to make informed decisions about training.



If you aren't administering training budgets, you don't need to set up any budgeting tables discussed in this topic. However, if you want to enter costs on any training administration pages, then you must set up the Training Base Currency and the Cost Unit Tables.

Overview of Training Cost Setup

To use the Budget Training module in PeopleSoft, you first need to set up your budgeting structure. Once you have all the pieces in place, you can use them to create realistic budgets on a regular basis.

To set up training costs and budgets:

1. Set up your training currency. In Budget Training, the system converts costs into a base currency that you define. For the conversion to work, you also need to define the exchange rate to use.

2. Review cost units.

Cost units are the units associated with a cost amount. For example, you might measure instructor costs per hour or per day, but the cost unit for mileage might be per km. So, to enter a cost, you enter the amount and then select a cost unit for that amount. PeopleSoft delivers a set of cost units in the Cost Unit Table. If you need to add further cost units, see [Setting Up Training Cost Units](#).

3. Set up default vendor, facility, equipment, and instructor costs.

To create accurate budgets, you need to record default costs for each training element, such as vendor or facility costs. You can set up default costs for your catalog and then use these as defaults for course costs.



For more information about entering default costs, see [Setting Up Default Training Costs](#).

4. Set up student costs. Training budgets needs to include the cost of sending an employee on a course. For example, if an employee's time is normally billed to a client, time in training represents a loss in revenue.



For more information about defining student costs, see [Setting Up Student Costs](#).

5. Set up budget periods and departmental budgets.

Once you have your basic costs set up, you can enter budgets for departments in your organization.



For more information about creating training budgets, see [Setting Up Training Budgets](#).

Setting Up the Training Cost Currency

The first step in setting up training costs is to define the currency that you want to use in Budget Training. This section explains how currencies default in the system and how to set up your currency and currency exchange rate.

Overview of Training Currencies

As you work in the Budget Training module, the system always displays costs that are up-to-date without the need to run any periodic batch process to update costs or currency conversion information. The system can provide this immediate updated cost information because it calculates costs as soon as you enter them into the system. The system accomplishes this by converting all amounts into a *single base currency* and storing these computed costs in two training cost tables—TRN_ALL_COST and TRN_CST_ELEMENT.

When you open a summary page in the Budget Training or Administer Training menu to look at cost information for an employee, a department, or your organization as a whole, the system again converts the costs which are stored in the training cost tables, into the display currency appropriate to the organizational level. Display currencies can be different from your training base currency.



Departments can have display currencies that are different from your budget base currency for your organization. Depending on the Business Unit and the Department that an employee belongs to, the employee level display currency could be different from your organizational currency. You associate a base currency with a Business Unit—and the departments associated with that Business Unit—for a Budget Period on the Budget Period Table (BUDGET_PERIOD_TBL).

To provide a consistent means of tracking and maintaining training costs, you need to specify a training currency exchange rate. This ensures that all training costs are consistently converted over your budget periods using a single conversion rate. Specifying a training currency exchange rate will help you insulate your training process from external fluctuations in exchange rates and provide you with consistent cost information through you budget period.

To set up training cost currency information:

6. Create a currency rate type for budget training.

Add a new rate type for budget training from the General Options menu.



For more information about how to set up currency rates and rate types and for general discussion of currency conversion in PeopleSoft HRMS, see *Working with Currencies*.

7. Set up a training currency exchange rate.

Having defined your currency rate type, you can now define the various exchange rates that you want your budget training business module to track by selecting **Define Business Rules, Define General Options, Setup, Market Rate**.

8. Set up the base currency for budget training.

Even if you have already defined a base currency for your HRMS system in the Define General Options menu, before you can establish any training costs in the Training Administration business process, you need to define a special training base currency using the Base Currency Page.

Understanding Training Base Currency Defaulting

When you're entering training costs in your Training Administration and Budget Training pages, it is important to understand where the default currency code is coming from and how the system determines currency defaulting in the Administer Training business process.

In budget training, we have extended this functionality by adding a further level of currency manipulation that considers the nature of the cost before any cost conversions are performed.

We achieve this by establishing a relationship between the nature of the cost and the use requirement at cost summary time. The nature of the cost describes the point in the business process at which you are reviewing costs. The table below describes this relationship:

Nature of Cost	Process Status	Currency Used for Costs
Budget training plan level	Overall training plan cost summary for specified budget period.	Currency defined in the Budget Period Table.
Department level	Case 1: Budget has been allocated to the current department. Case 2: Current department isn't allocated a budget.	Case 1: Per Unit Cost Base Currency Code defined in the Department Budget Table. Case 2: Base Currency defined in this module's Base Currency Table.
No budget period or department. For example, Employee Training Cost	Non-budget training specific.	Currency defined in system Installation Table.

Performing Training Cost Currency Conversions

The following table explains training cost currency defaulting in the Budget Training and Administer Training modules. The table also details how the system uses Budget Period Begin Dates or Effective Dates to establish the exchange rate to use when it converts costs from one currency to another.

Cost Type	Currency
Training Element Cost (for example, Facility cost)	Costs are stored in the currency that you enter.
Course Costs / Catalog Costs	Costs are stored in table TRN_XXX_COST in the entered currency. Computed Costs are stored in TRN_CST_ELEMENT with the base currency. The system uses the effective date that is entered in the page as the currency conversion date.
Salary Costs (General Demand)	Costs are stored in table TRN_DEMAND in the currency that you entered. The system stores Computed Costs in TRN_CST_ELEMENT in the base currency. The date the system uses for the conversion from the entered currency to the base currency is the Begin Date of the Budget Period for which the demand was defined.

<p>Displayed Costs (Summary Pages, Budget Plan)</p>	<p>The system converts costs from the base currency to the displayed currency. The date the system uses for the conversion is the Begin Date of the Budget Period.</p>
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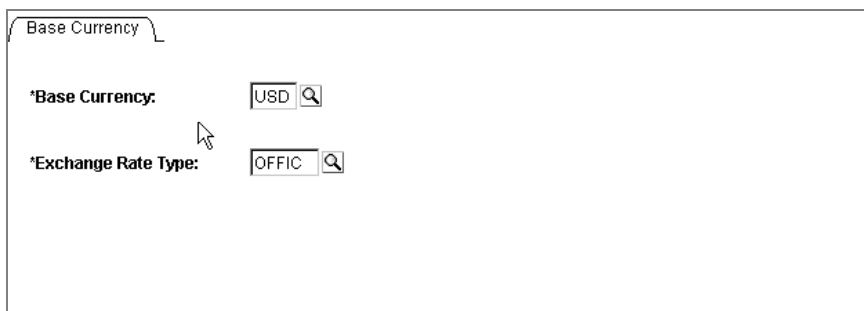
The date the system uses to convert to the base currency and the date the system uses to convert to the display currency are not the same, with the exception of the Job Code Cost. The system uses the Effective Date of the Course/Catalog Costs to convert to the base currency and the Begin Date of the Budget Period to convert to the display currency.

The system uses different dates to process the two currency conversions. Therefore, if the length of time is great enough between these two dates to allow for changes in the currency conversion rate that your organization ordinarily uses for currency conversions, the displayed cost could be very different from the cost that you originally entered. To avoid this problem, you'll define a special exchange rate on the Exchange Rate Table for use by the Budget Training business process.

Because you are comparing your training budgets with training costs over a period of time (budget period) you can set up a unique training currency exchange rate that enables you to track training costs consistently through your budgetary cycle. In order to do that, you'll set up an exchange rate type specifically for your training budget so that you calculate the costs consistently on a periodic basis.

Base Currency Page

Usage	Use the Base Currency page (TRN_BASE_CURRENCY) to specify the base currency in which you want to track all cost amounts.
Object Name	TRN_BASE_CURRENCY
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Base Currency, Base Currency • Develop Workforce, Administer Training (USF), Setup, Base Currency, Base Currency • Develop Workforce, Budget Training (GBL), Setup, Base Currency, Base Currency
Prerequisites	Establish Currencies
Access Requirements	None



The screenshot shows a web form titled "Base Currency". It contains two rows of input fields. The first row is labeled "*Base Currency:" and has a text box containing "USD" with a magnifying glass icon to its right. The second row is labeled "*Exchange Rate Type:" and has a text box containing "OFFIC" with a magnifying glass icon to its right. A mouse cursor is positioned over the "OFFIC" text box.

Base Currency page

Select a Currency Code to use as your training cost **Base Currency** from the values in the Currency Code Table. While you can enter training costs in multiple currencies, the system will convert any training costs in your Administer Training business process to the Base Currency that you establish here.

Select the currency **Exchange Rate Type** for your budget training business process, which you set up earlier. If you've defined an exchange rate type specifically for training, associate it with your training base currency here. The exchange rate type that you specify controls currency conversion processing in the Administer Training and Budget Training modules. You define Currency Exchange Rates on the Currency Exchange Rate Table.



You can define a currency exchange rate and currency exchange rate type specifically to track your training budget costs.



For more information about setting up a training currency exchange rate type, see [Setting Up Default Training Costs](#). For more information about working with the Base Currency, Exchange Rate Type and Currency Rate Type Tables, see [Working with Currencies](#).

Setting Up Training Cost Units

The units of cost specified on the Cost Unit Table impact how you define specific costs for various training components. With each training expense that you define, you'll associate a cost unit as a measurement criteria.

Overview of Cost Units and Cost Type

You enter Per Unit Costs for training components like facilities, vendors, books, and other materials on pages throughout the Budget and Administer Training Business Process modules. When you do this, the system uses the Cost Unit Type associated with a training component to determine the subset of Cost Units that it should display in a prompt as you enter cost information. For instance, when you enter a cost for an instructor, the system won't display cost units such as *km/miles* as a valid Cost Unit value.

We deliver your system with four predefined cost unit types (categories) that are set up to limit your selection to valid Cost Units that are based on the kind of cost that you're tracking in the Administer and Budget Training modules.

Cost Unit Type	Purpose
Metrics	Use for traveled distance expenses (for example m, km).
Time	Use for time duration (for example, hour, day).
Training	Use for specific training cost types such as, Flat Cost, Person/Day.
General	Use when unsure of cost type.

Using Views to Select the Right Cost Unit

To ensure that the system displays the appropriate Cost Unit options when you enter different categories of costs on the training cost pages, the Cost Unit field on the training cost pages prompts to a view that selects one or several cost units by specifying the cost unit type that is associated with the cost unit.

When you enter Instructor costs, the cost unit prompts to the view, TD_COST_UNIT_VW, which selects Time cost units and Training cost units only.

For Expenses, the system performs no special Cost Unit Type selection, and you can select any Cost Unit Table (COST_UNIT_TBL) values.

Cost Type and Duration Amounts

The Duration Cost Unit is a display only label on training cost pages because it is based entirely on the Cost Unit that you selected for the Per Unit Cost to which the Duration amount is related. For example, when you enter a cost for instructors on the Course Session Cost Table, you may have two instructors teaching the same course session. The two instructors may work together to teach the course session at the same time, or one may present one portion of the session, and the other may present another. In either case, you need to specify how long each instructor works on this course session.

To do so, you enter a Duration period for each instructor. The unit for this duration period depends on the Cost Unit that you chose for the Per Unit Cost amount for the instructor. If the instructor costs your organization \$200 USD per person/per day, the duration cost unit will be in days. If you indicated that the instructor cost is \$200 per person/per year, the duration cost unit will be in years.

We specified the relationship between the Cost Unit and Duration Label on the Cost Type Table.



For more information about how the system calculates training costs based on cost unit, see Understanding How the System Calculates Training Element Costs.

Cost Unit Table Page

Usage	Use the Cost Unit Table page to specify the relationship between the Cost Unit and Duration Label on the Cost Type Table.
Object Name	COST_UNIT_TABLE
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Cost Unit Table, Cost Unit Table • Develop Workforce, Administer Training (USF), Setup, Cost Unit Table, Cost Unit Table • Develop Workforce, Budget Training (GBL), Setup, Cost Unit Table, Cost Unit Table
Prerequisites	None
Access Requirements	Enter a Cost Unit.

Cost Unit Table

Cost Unit: STUD/D

***Description:**

Short Description:

***Cost Unit Type:**

Duration Label:

Cost Unit Table page



Changing the Cost Unit Table data can negatively impact the way your system calculates expenses and can require additional PeopleCode changes and other modifications that impact all Budget Training cost calculations.

Enter a **Description** and **Short Description** for the **Cost Unit**.

Enter a **Cost Unit Type** to group similar cost units together. As you identify various training costs in your business process, you'll be entering units of cost for each training component, such as instructors. To provide you with a prompt list that corresponds to your training component, we use the Cost Unit Type as a key field for the prompt table. For example, to define instructor costs, distance metrics won't be applicable and not offered as valid value in the Translate Table. Instead, you'll be prompted for other values, such as time and training related metrics.

You can select from these options:

Cost Unit Type	Purpose
Metrics	Use for expensing traveled distances (for example m, km).
Time	Use for time duration (for example, hour, day).
Training	Use for specific training cost types such as, Flat Cost, Person/Day.
General	Use when unsure of cost type.

Enter the **Duration Label** to use on the Cost pages when specifying instructor cost details. The unit of this duration depends on the cost unit that you select. For example, if the instructor cost unit is \$200 per person/day, the duration will be in days.

Setting Up Default Training Costs

After you've defined courses and all other ancillary pieces of training provision, you'll set up the costs associated with training. You define each specific piece of the cost of training separately: for example, costs of an instructor, training equipment and materials, vendors, facility, and expenses.

Overview of Default Costs

Training costs are defined in two parts: per unit cost and cost unit. The per unit cost is the amount, and the cost unit is the unit associated with that amount. For example, if an instructor costs \$100.00 per hour, the Per Unit Cost is *100* and the Cost Unit is *Hour*.

When you are specifying course element costs on the Catalog Cost Table, the Course Table, and Course Session Cost Table, some cost elements tend to be the same. For example, instructors tend to charge the same fee even if they are teaching different courses. Facility costs and vendor costs tend to remain constant for different courses, as well. Because these costs tend to remain the same across courses and sessions, the system stores the instructor cost on the Instructor Table (INSTRUCTOR_TBL), the Training Facility Table (FACILITY_TBL), and the Vendor Table (VENDOR_TBL). The system uses the cost on the Instructor, Vendor and Facility Tables as the default cost for instructors, vendors and facilities whenever they are referenced in the Administer Training and Budget Training modules.

Defining Catalog Costs

Use the Catalog Cost Table component to record cost information for a particular category and related subcategories within your training catalog. This information can then be used as a default for your Course Cost Table.

In your course catalog, you can organize your courses into categories and subcategories for easier administration. You can associate a cost with each category and subcategory. Doing this means

that when you assign a course to a category or subcategory, the system assigns the subcategory cost as the default cost of the course.

If you only assign a course to a category, the system uses the category cost. If you assign the course to a subcategory, the system uses the subcategory cost. Using subcategories enables you to define your defaults more exactly, but may not be necessary for your organization.

Defining Course Session Costs

Specifying costs at the course session level enables you to track differences in training cost that can vary depending on where sessions are taught (facilities cost) and who is teaching a session. This is important because different instructors may charge different rates to teach the same sessions of a course. The system will look at the Course Session Cost Table to determine how much the training will cost when you enroll a student in a particular session.



For more information about setting up and working with course sessions, see *Administering Course Sessions*.

Catalog Cost - Vendor, Facility, Equipment Page

Usage	Use the Vendor, Facility, Equipment page to enter default vendor, facility, and equipment costs for a category or subcategory.
Object Name	TRN_COSTC_TBL1_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Catalog Cost, Vendor, Facility, Equipment • Develop Workforce, Administer Training (USF), Setup, Catalog Cost, Vendor, Facility, Equipment • Develop Workforce, Budget Training (GBL), Setup, Catalog Cost, Vendor, Facility, Equipment
Prerequisites	Before you can use this page to enter costs, you must set up your categories and subcategories on the Category/Subcategory Table Page.
Access Requirements	To enter costs for a category, select the Category Code and a Subcategory of <i>UNKNOWN</i> . To enter costs for a subcategory, enter a Category Code and a Subcategory Code.

Vendor, Facility, Equipment | Instructor, Expense

Category Code: HUMRES Subcategory Code: UNKNOWN

Catalog Cost View All First 1 of 1 Last

*Effective Date: 31/05/2000 Default Costs + -

Vendor

Vendor: [] Per Unit Cost: [] *Cost Unit: Hour

▼ France

Certified Chargeable

Facility

Vendor: [] Facility: []

Room Code: []

Per Unit Cost: [] *Cost Unit: Hour

Session Equipment/Materials View All First 1 of 1 Last

*Equipment/Materials Code	*Qty	Per Unit Cost	*Cost Unit
[]	1	[]	Hour

Catalog Cost - Vendor, Facility, Equipment page

The system displays the **Category Code** and **Subcategory Code** that you entered. These fields are for information only.

Catalog Cost

Effective Date

The **Effective Date** defaults to the current date. Effective dating enables you to track training costs with respect to a defined budget period. All cost evaluations within the defined budget period are performed against previous training course costs with effective dates earlier than or equal to the budget period that is being considered.

Default Costs

If you are setting up costs for a subcategory, click the **Default Costs** button to populate the cost fields with default costs that you have defined for the category. You can select to accept or modify these default costs as necessary.

Vendor

Vendor

Select the default **Vendor** for the category or subcategory from the list of valid vendors. You define vendors in the Vendor Table.

Per Unit Cost

The system defaults the vendor cost from the Vendor table if you have set up vendor costs. You can override the defaults as necessary.

Cost Unit

Select the **Cost Unit** associated with the cost that you entered in **Per Unit Cost**.

For more information about cost units, see [Setting Up Training Cost Units](#).

France

For French companies, additional vendor fields are required to meet the French legal reporting requirements:

Certified

Select the **Certified** check box if the vendor is certified to provide the training courses.

Chargeable

Select the **Chargeable** check box if the costs are chargeable and can be declared on the 2483 Training report.



For more information about the French 2483 legal reporting requirement, see [Producing the French Training Report 2483](#).

Facility

Use the **Facility** group box to define the default training facility that you use for training courses in the selected category or subcategory.

Vendor

If you use a vendor's facility for the courses, select the **Vendor** from the list of valid vendors. Otherwise, leave this field blank.

Facility

If the default facility is in the Training Facility Table, select the facility code from the list of valid values. When you move out of the field, the system displays the facility.

If the facility isn't in the Training Facility Table, leave the facility code blank and enter the facility name in the facility name field.

Room Code

Select a room for the courses from the list of rooms available at the selected facility. When you move out of this field, the system displays the room name.

If you didn't select a training facility from your Training Facility Table, the system makes this field unavailable for entry.

Per Unit Cost The system defaults the room costs from the Training Room table if you have set up room costs. You can override the defaults as necessary.

If you didn't select a training facility from your Training Facility Table, enter the cost of the room and the associated unit in the **Cost Unit** field.

Cost Unit Select the **Cost Unit** that is associated with the value in **Per Unit Cost**.

Session Equipment/Materials

Use the **Session Equipment/Materials** group box to define the default equipment and material costs for the courses in the category or subcategory.

Equipment/Materials Code Select the equipment code from the list of valid values. Equipment codes are set up in the Equipment and Materials Table.

Insert a row for each equipment/material code that is required for the courses.

Qty (quantity) Enter the quantity required for each **Equipment/Material Code**.

Per Unit Cost Enter a **Per Unit Cost** for each item.

Cost Unit Select a **Cost Unit** that is associated with the value in **Per Unit Cost**.

Catalog Cost - Instructor, Expense Page

Usage	Use the Instructor, Expense page to set up default instructor costs and other expenses that are associated with courses in a selected category or subcategory.
Object Name	TRN_COSTC_TBL2_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Catalog Cost, Instructor, Expense • Develop Workforce, Administer Training (USF), Setup, Catalog Cost, Instructor, Expense • Develop Workforce, Budget Training (GBL), Setup, Catalog Cost, Instructor, Expense
Prerequisites	Before you can use this page to enter costs, you must set up your categories and subcategories on the Category/Subcategory Table Page.
Access Requirements	Enter a Category Code and Subcategory Code.

Vendor, Facility, Equipment		Instructor, Expense	
Category Code:	HUMRES	Subcategory Code:	UNKNOWN
Catalog Cost		View All First 1 of 1 Last	
Effective Date:	31/05/2000		
Instructor		View All First 1 of 1 Last	
Vendor	Instructor ID	Per Unit Cost	*Cost Unit
<input type="text"/>	<input type="text" value="KC0015"/>	<input type="text" value="750.00"/>	<input type="text" value="CAD"/> <input type="text" value="Day"/>
Name:	<input type="text" value="Campbell,Barry Robert"/>	Duration:	<input type="text"/> <input type="text" value="Hour"/> <input checked="" type="checkbox"/> From Course
Expense		View All First 1 of 1 Last	
*Expense Type	*Qty	*Per Unit Cost	*Cost Unit
<input type="text" value="K01EXPN"/>	<input type="text" value="10"/>	<input type="text" value="30.00"/>	<input type="text" value="USD"/> <input type="text" value="Flat Cost"/>

Catalog Cost - Instructor, Expense page

The system displays the **Category Code** and **Subcategory Code** that you entered. These fields are for information only.

Instructor

Use the **Instructor** group box to enter default instructor costs and default duration for the category.

Vendor

If the courses in the category or subcategory are run by an external vendor, select the **Vendor ID** from the list of vendors that you have set up in the Vendor Table. If you're using an internal instructor, leave the **Vendor** field blank.

Instructor ID

If the instructor is in your Instructor Table, select the **Instructor ID** from the list of valid values. If the instructor isn't in the Instructor Table, leave this field blank and complete the **Name** field.

Name

If the instructor isn't defined in the Instructor Table, enter the instructor's **Name**.

Per Unit Cost

The system populates the **Per Unit Cost** for the instructor from the Instructor Table. Override the default cost, if necessary.

Cost Unit

Select the **Cost Unit** that is associated with the value in **Per Unit Cost**.

Duration The system populates the default **Duration** that you set up for the category or subcategory on the Category/Subcategory Table Page.

If you want to override the default value, clear the **From Course** check box and enter the **Duration** manually.

From Course The system automatically selects the **From Course** check box to show that the **Duration** was populated from the Category Table. Clear the **From Course** check box if you want to override the default **Duration**.

Expense

Use the **Expense** group box to enter default expenses for the category or subcategory.

Expense Type Select the **Expense Type** from the list of valid values.

Qty (quantity) Enter the quantity of the item specified in **Expense Type**.

Per Unit Cost Enter the **Per Unit Cost** for the expense.

Cost Unit Select the **Cost Unit** that is associated with the value in **Per Unit Cost**.

Course Cost - Vendor, Facility, and Equipment Page

Usage	Use the Course Cost - Vendor, Facility, Equipment page to define the cost of courses in your training catalog. These costs may be the same as the costs associated with the category or subcategory to which the course belongs or they may be different, depending how your organization needs to define its course costs.
Object Name	TRN_COST_TBL1_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Cost, Vendor, Facility, Equipment • Develop Workforce, Administer Training (USF), Setup, Course Cost, Vendor, Facility, Equipment • Develop Workforce, Budget Training (GBL), Setup, Course Cost, Vendor, Facility, Equipment
Prerequisites	If you want to default course costs from the category or subcategory, set up these default costs using the Catalog Cost component.
Access Requirements	Enter a Course Code.

Vendor, Facility, Equipment | **Instructor, Expense**

Course Code: K001 Time Management

Course Cost View All First 1 of 1 Last

*Effective Date: 01/01/1980 Default Costs + -

Vendor

Vendor Per Unit Cost *Cost Unit

France

Certified Chargeable

Facility

Vendor Facility KCFAC1 Canadian Headquarters

Room Code ROOM1 Training Room 1

Per Unit Cost 2250.00 CAD *Cost Unit Day

Session Equipment/Materials View All First 1 of 3 Last

*Equipment/Materials Code	*Qty	Per Unit Cost	*Cost Unit
K002 White Brd	1	USD	Hour

Course Cost - Vendor, Facility, Equipment page

The system displays the **Course Code** that you entered. This field is for information only.

Course Cost

Effective Date

The **Effective Date** defaults to the current date. Effective dating enables you to track training costs with respect to a defined budget period. All cost evaluations within the defined budget period are performed against previous training course costs with effective dates earlier than or equal to the budget period that are being considered.

Default Costs

Click the **Default Costs** button to populate the cost fields with default costs that you have defined for the category or subcategory. When you click the button, the system displays the From Which Category / Sub-Category Page where you select the Category and Subcategory. You can select to accept or modify these default costs as necessary.

Vendor

If an external vendor runs the course, use the **Vendor** group box to define the default vendor costs.

Vendor

Select the default **Vendor** for the category or subcategory from the list of valid vendors. You define vendors in the Vendor Table.

Per Unit Cost	The system defaults the vendor cost from the Vendor table if you have set up vendor costs. You can override the default as necessary.
Cost Unit	Select the Cost Unit that is associated with the cost that you entered in Per Unit Cost .

For more information about cost units, see Setting Up Training Cost Units.

France

For French companies, additional vendor fields are required to meet the French legal reporting requirements:

Certified	Select the Certified check box if the vendor is certified to provide the training courses.
Chargeable	Select the Chargeable check box if the costs are chargeable and can be declared on the 2483 Training report.



For more information about the French 2483 legal reporting requirement, see Producing the French Training Report 2483.

Facility

Use the **Facility** group box to define the default facility used for the training course.

Vendor	If you use a vendor's facility for the course, select the Vendor from the list of valid vendors. Otherwise, leave this field blank.
Facility	<p>If the default facility is in the Training Facility Table, select the Facility code from the list of valid values. When you move out of the field, the system displays the facility.</p> <p>If the facility isn't in the Training Facility Table, leave the Facility code blank and enter the facility name in the facility name field.</p>

Room Code	Select a room for the course from the list of rooms that are available at the selected facility. When you move out of this field, the system displays the room name. If you didn't select a training facility from your Training Facility Table, the system makes this field unavailable for entry.
Per Unit Cost	The system populates the room cost from the Training Room table if you have set up room costs. You can override the default as necessary. If you didn't select a training facility from your Training Facility Table, enter the cost of the room and the associated unit in the Cost Unit field.
Cost Unit	Select the Cost Unit that is associated with the value in Per Unit Cost .

Session Equipment/Materials

Use the **Session Equipment/Materials** group box to define the default equipment and material costs for the course.

Equipment/Materials Code	Select the equipment code from the list of valid values. Equipment codes are set up in the Equipment and Materials Table. Insert a row for each equipment/material code required for the course.
Qty (quantity)	Enter the quantity required for each Equipment/Material Code .
Per Unit Cost	Enter a Per Unit Cost for each item.
Cost Unit	Select a Cost Unit list that is associated with the value in Per Unit Cost .



For more information about catalog costs and courses, see Overview of Default Costs.

From Which Category / Sub-Category Page

Usage	Use the From Which Category / Sub-Category page to select the source of default costs. You can default course costs from a category or subcategory according to your catalog structure.
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Object Name	TRN_CATLG_CRSE_SEC
Navigation	To access the page, click the Default Costs button on the Course Cost - Vendor, Facility, and Equipment Page.

From which Category / Sub-Category

Course Code: K001 Time Management

Category Code: Planning

Subcategory Code: Organization

From which Category/Sub-Category page

Category Code Select the **Category Code** from the list of categories to which the course belongs.

Subcategory Code Select the **Subcategory Code** from the list of subcategories for the categories.

If you want to default costs from the category level, select the **Category Code** and enter **UNKNOWN** in **Subcategory Code**.

Course Cost - Instructor, Expense Page

Usage	Use the Instructor, Expense page to define instructor costs and other expenses for a course, such as meals or parking fees.
Object Name	TRN_COST_TBL2_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Cost, Instructor, Expense • Develop Workforce, Administer Training (USF), Setup, Course Cost, Instructor, Expense • Develop Workforce, Budget Training (GBL), Setup, Course Cost, Instructor, Expense
Prerequisites	You must set up your course codes on the Course Table before you can use this page.
Access Requirements	Enter a Course Code.

Vendor, Facility, Equipment | Instructor, Expense

Course Code: K001 Time Management

Course Cost View All First 1 of 1 Last

Effective Date: 01/01/1980

Instructor View All First 1 of 1 Last

Vendor	Instructor ID	Per Unit Cost	*Cost Unit:
	KC0015	750.00	Day

Name: Campbell, Barry Robert Duration: 2.0 Day From Course

Expense View All First 1-2 of 2 Last

*Expense Type	*Qty	*Per Unit Cost	*Cost Unit
K03EXPN	1	40.00	Pers/Day
K05EXPN	1	15.00	Pers/Day

Course Cost - Instructor, Expense page

The system displays the **Course Code** that you entered. This field is for information only.

Instructor

Use the **Instructor** group box to enter default instructor costs and default duration for the course.

Vendor

If the course is run by an external vendor, select the Vendor ID from the list of vendors that you have set up in the Vendor Table. If you're using an internal instructor, leave the **Vendor** field blank.

Instructor ID

If the instructor is in your Instructor Table, select the **Instructor ID** from the list of valid values. If the instructor isn't in the Instructor Table, leave this field blank and complete the **Name** field.

Name

If the instructor isn't defined in the Instructor Table, enter the instructor's **Name**.

Per Unit Cost

The system populates the **Per Unit Cost** for the instructor, from the Instructor Table. Override the default cost, if necessary.

Cost Unit

Select the **Cost Unit** that is associated with the value in **Per Unit Cost**.

Duration

The system populates the default **Duration** that you set up for the course on the Course Table - Course Profile Page.

If you want to override the default value, clear the **From Course** check box and enter the **Duration** manually.

From Course The system automatically selects the **From Course** check box to show that the **Duration** was populated from the Course Table. Clear the **From Course** check box if you want to override the default **Duration**.

Expense

Use the **Expense** group box to enter default expenses for the course.

- Expense Type** Select the **Expense Type** from the list of valid values.
- Qty (quantity)** Enter the quantity of the item specified in **Expense Type**.
- Per Unit Cost** Enter the **Per Unit Cost** for the expense.
- Cost Unit** Select the **Cost Unit** that is associated with the value in **Per Unit Cost**.

Setting Up Student Costs

To track the total cost of an employee who is taking a training course, you need to record not only the costs associated with the course itself, such as the price of materials and instructors, but also the cost to your organization of the employee’s lost work time. For example, if an employee typically bills their time to clients, then they cannot bill time while they are in training. This represents an additional training expense for your company. To track these payroll costs associated with training, you can specify compensation costs at the Job Code level and at the individual employee level. If you want to associate payroll costs with a group of similar Job Codes or a group of employees, you can use the Populate EE (employee) Training Costs process to perform a mass update of your system.



When the system processes training costs for an employee, if no employee training cost is specified on the Employee Training Cost Table, the system will use the Job Code Training Cost. If you’ve specified training costs at both levels, the employee level training cost takes priority.

Overview of Student Training Cost Defaulting

Before you begin entering costs associated with Job Codes and employees in your organization, it’s important to understand how the system defaults training costs into any system pages where you’re tracking training costs. The following chart explains the training cost defaults in the Budget Training module:

<i>Page Name</i>	<i>Defaulted from</i>
Job Code Training Cost	No default.
Employee Training Cost	Defaulted from Job Code Training Cost.

Page Name	Defaulted from
Employee Demand	Default from Employee Training Cost when defined; otherwise, the default comes from Job Code Training Cost (with the employee's job code) otherwise set to blank.
General Demand	Set to blank by default; however, when a profile is used as a template, the Training Cost is computed with employees/job codes included in the profile. The Compute button is used to compute the Training cost with job codes listed in the page.
Department Demand	No Default.
Employee Demand by Course	Defaults the same as Employee Demand.



For more information about setting up and working with training Demands, see *Determining Training Demands for Your Organization*.

Job Code Training Cost Page

Usage	Use the Job Code Training Cost page to identify the compensation cost of having an employee in this job code in training. For example, if you have a job code of senior consultant, and a person in this job normally bills their time, this would be the cost to your organization due to the loss of their billable time while the employee is in training.
Object Name	TRN_JOB_SLR_COST
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Job Code Training Cost, Job Code Training Cost • Develop Workforce, Administer Training (USF), Setup, Job Code Training Cost, Job Code Training Cost • Develop Workforce, Budget Training (GBL), Setup, Job Code Training Cost, Job Code Training Cost
Prerequisites	None
Access Requirements	Enter a SetID and Job Code.

Job Code Training Cost

SetID: SHARE Table Set shared across Corp

Job Code: KU051 Administrative Assistant

Training Cost Details					
*Effective Date	*Status	*Per Unit Cost	*Currency	*Cost Unit	
01/04/1999	Active	30.45	USD	Pers/Day	+ -

Job Code Training Cost page

Training Cost Details

The **Effective Date** defaults to the system date, which is usually today’s date. You’ll change this unless you want the job code training cost to go into effect today. The job code training cost **Status** defaults to *Active*.

Enter the **Per Unit Cost** for the **Job Code** and the associated **Cost Unit** with which this cost is to be measured. Because the **Per Unit Cost** and **Cost Unit** fields are effective-dated, you are able to enter standard training costs for job codes, which can change over time.

The system automatically populates the **Currency**. Override the default if the cost is in a different currency.

Employee Training Cost Page

Usage	Use the Employee Training Cost page to define the costs to your organization of having a selected employee in training. For example, if you have employees who normally bill their time to a customer, you can enter the cost of lost billing time while they are in training. Entering employee level information is optional. If you don’t enter information here, the system populates the field with the job code cost information that you entered on the Job Code Training Cost Table. Use this page to override the standard job code cost amounts for particular employees.
Object Name	TRN_EE_SALARY_COST
Navigation	<ul style="list-style-type: none"> Develop Workforce, Administer Training (GBL), Setup, Employee Training Cost, Employee Training Cost Develop Workforce, Administer Training (USF), Setup, Employee Training Cost, Employee Training Cost Develop Workforce, Budget Training (GBL), Setup, Employee Training Cost, Employee Training Cost
Prerequisites	None
Access Requirements	Enter an Employee ID and Employment Record Number.

Employee Training Cost

EmplID: KU0020 Stevenson,Christelle Empl Rcd#: 0

Training Cost Details View All First 1 of 1 Last

Cost Job Period

*Training Type	*Effective Date	*Status	Per Unit Cost	*Currency	*Cost Unit
Budget Trn	01/01/1999	Active	25.00	USD	Pers/Day

Employee Training Cost: Cost page



Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

Common Page Information

The system displays the **EmplID** (employee ID) and **Empl Rcd#** (employment record number) that you entered. These fields are for information only.

Training Type

If you store separate training costs for administer training and budget training, select one of these **Training Type** options:

Admin. Trg (administer training).

Budget Trg (budget training).

French organizations store separate costs in order to administer training and budget training. If you aren't a French customer or you don't want to track separate costs for Administer and Budget Training, accept the **Budget Trg** default.

For more information about the 2483 report, see "Producing the French Training Report 2483".

Effective Date

The **Effective Date** defaults to the system date. Change the default as necessary.

Cost Tab

See the previous screen shot for a view of this tab.

Per Unit Cost

Enter the employee cost and the associated unit in the **Cost Unit** field.

Currency

The system populates the **Currency** code. You can override this, if necessary.

Cost Unit Select the **Cost Unit** that is associated with the value in **Per Unit Cost**.

Job Tab

Training Cost Details						View All	First	1 of 1	Last
Cost	Job	Period							
*Training Type	*Effective Date	*Status	Job Code	Description					
Budget Trn	01/01/1999	Active	KU071	Sr Payroll Clerk					

Employee Training Cost: Job page

Status The employee training cost **Status** defaults to *Active*.

Job Code The system defaults the employee’s **Job Code** from the Job Data Table and makes this field unavailable for entry.

Description The system defaults the job **Description** from the Job Data Table and makes this field unavailable for entry.

Period Tab

Training Cost Details						View All	First	1 of 1	Last
Cost	Job	Period							
*Training Type	*Effective Date	*Status	Period Begin Date	Period End Date	Calc. Flag				
Budget Trn	01/01/1999	Active			Manually				

Employee Training Cost: Period page

Period Begin Date Enter the date on which the cost that you specified comes into effect.

If you have separate costs for administer training and budget training, the period over which costs apply varies. Administer Training costs cover pay periods, whereas Budget Training costs apply to budget periods, which normally cover a year.

Period End Date Enter the end of the period to which the cost is related.

Calc. Flag (calculate flag) The system sets this field to *Manually* to indicate that the cost has been entered manually. The system makes this field unavailable for entry.

Populate EE Training Cost Page

Usage	<p>Use the Populate EE (employee) Training Cost page to process training costs for a group of job codes or employees. The Job Code Training Cost and Employee Training Cost pages enable you to associate payroll costs with a job code and by employees one at a time. You can use this process to specify a per unit cost figure and a cost unit metric that you want to apply on the specified effective date to a group of Job Codes or Employees.</p> <p>A third option is available for French organizations that store training costs in their payroll system. If your organization runs PeopleSoft Global Payroll for France, you can extract administer training and budget training costs from the payroll system and apply the costs to employees in a given Group ID.</p>
Object Name	RUNCTL_TRN006
Navigation	Develop Workforce, Budget Training (GBL), Process, Populate EE Training Cost, Populate EE Training Cost
Prerequisites	None
Access Requirements	Enter a Run Control ID.

Populate EE Training Cost page

The system displays your **User ID** and the **Run Control ID** that you entered. These fields are for information only.

As Of Date Enter the date that will act as the effective date for this process.

- Per Unit Cost** Enter the cost that you want to use for processing the cost per job or cost per employee.

If you select **Load from Global Payroll** to take costs from your payroll system, costs are not entered manually so the system makes the **Per Unit Cost** field unavailable for entry.
- Cost Unit** Select the **Cost Unit** that is associated with **Per Unit Cost**. The system makes this field unavailable if you select **Load from Global Payroll** because costs are not entered manually but are calculated by the payroll runs.
- Apply on Jobcodes** Select the **Apply on Jobcodes** option if you want to apply the cost to employees with a given job code.
- Apply on Employees** Select the **Apply on Employees** option if you want to apply the cost to given employees.
- Load from Global Payroll** Select the **Load from Global Payroll** option if you want to apply costs from your PeopleSoft Global Payroll for France system to a group of employees. This option is only available to French customers.

Depending on the option that you select, the system displays a group box and hides others:

<i>Option</i>	<i>Group Box Displayed</i>
Apply on Jobcodes	SetID and Jobcode
Apply on Employees	EmplID
Load from Global Payroll	France

SetID and Jobcode

Select the SetID and Jobcode to which you want to apply the selected cost. Add as many setIDs and job codes as necessary.

EmplID

Select the employee ID to which you want to apply the selected cost. Add further employees as necessary.

France

From a regulatory perspective, individual hourly training rates must be provided for Administer and Budget Training. In France, Administer Training costs are based on an average hourly rate over a monthly period of time, and Budget Training costs are based on an average hourly rate over the previous year.

PeopleSoft Global Payroll for France delivers as sample data, four accumulators and two formulas that you can use as an example for coding your rules in your PeopleSoft Global Payroll system.



For more information about the PeopleSoft Global Payroll accumulators and formula, see your PeopleSoft Global Payroll documentation.

Group ID

Select the group from the list of valid groups. The group ID defines the employees whose training costs are retrieved from your PeopleSoft Global Payroll for France system. Define groups from the Manage Human Resources menu.

For more information about building groups, see PeopleSoft 8 Application Fundamentals for HRMS, “Working With Groups”.

Administer Training

Select the **Administer Training** option if you want to load the administer training cost from your payroll system.

Budget Training

Select the **Budget Training** option if you want to load the budget training cost from your payroll system.

Element Name

Select the payroll element that stores the training cost that you want to apply to the specified group.



For more information about using PeopleSoft Global Payroll for France to store administer training and budget training costs, see your PeopleSoft Global Payroll documentation.

Pay Periods

Use the **Pay Periods** group box to define the periods for which you want to extract costs.

Period ID

Select the period from the list of valid payroll periods. For each period that is selected, the system loads costs into the employee training cost table.

Description

The system displays the description of the period and makes this field unavailable for entry.

Begin Date

The system displays the period start date and makes this field unavailable for entry.

End Date

The system displays the period end date and makes this field unavailable for entry.

Click **Run** to run this request. Process Scheduler runs the Populate EE Training Cost process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

Setting Up Training Budgets

With your currency conversion, base currency and cost units defined, you're ready to set up training budgets for departments in your organization on the following pages:

- **Budget Period Table Page.** Use this page to define the budgetary period that you want to use for your training plans.
- **Department Budget Table Page.** Use this page to allocate budget amounts to departments to meet their training needs.

Budget Period Table Page

Usage	Use the Budget Period Table page to define your budget periods. A budget period is simply a period of time for which a training budget is established. Your company's business needs determine the length of the budget period.
Object Name	BUDGET_PERIOD_TBL
Navigation	Develop Workforce, Budget Training (GBL), Setup, Budget Period Table, Budget Period Table
Prerequisites	None
Access Requirements	Enter a Budget Period.

Budget Period Table

Budget Period: K2000CALYR

***Description:** 2000 Training Budget Period

Short Description: 2000 Bdgt

From Date: 01/01/2000 ***Thru Date:** 12/31/2000

*Business Unit		Base Currency	
<input type="text" value="CAN01"/> <input type="button" value="Q"/>	GBI BU for Canada	<input type="text" value="CAD"/> <input type="button" value="Q"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="GBIBU"/> <input type="button" value="Q"/>	Global Business Institute BU	<input type="text" value="USD"/> <input type="button" value="Q"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="US004"/> <input type="button" value="Q"/>	GBI BU for US004	<input type="text" value="USD"/> <input type="button" value="Q"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="US006"/> <input type="button" value="Q"/>	GBI BU for US006	<input type="text" value="USD"/> <input type="button" value="Q"/>	<input type="button" value="+"/> <input type="button" value="-"/>

View All First 1-4 of 4 Last

Budget Period Table page



Important! When you are establishing a budget period, keep in mind that course sessions must fall within the budget period to be included in the budget and its tracking. Be sure that a course session does not span over two different budget periods.

Enter the **Description** and **Short Description** for the **Budget Period**.

Enter the **From Date** and **Thru Date** (begin and end dates) that you want the budget period to cover. Typically a budget period covers a one-year period. However, it depends on your business requirements and process cycles and could instead be a period of a quarter, month, or any other duration.

When you define a budget period, you need to associate it with one or more business units in your organization. Select the **Business Unit** and corresponding **Base Currency** for the various parts of your organization to be included within this budget period.

Add as many business units as necessary by inserting new rows. By doing this, you can create training budgets for the employees in those business units as necessary. You can use only those budget periods that are assigned to an employee's business unit when you set up and track budgeting demands. You associate employees with business units on the Job Data pages in the Administer Workforce menu.



For more information about business units, see Regulating HRMS System Data.

You use **Base Currency** for cost calculations in your business process where the budget period is a key field throughout the Budget Training and Training Administration modules.



For more information about base currency and how it works in budget training, see *Setting Up the Training Cost Currency* in this section.

Department Budget Table Page

Usage	Use the Department Budget Table page to define the amount allocated to departments in your organization for training in a given budget period. You can also specify the base currency for department budgets and training costs. This ensures that as you work within a department you are always comparing budgets and costs in the same currency. Use this departmental budget to examine how the estimated actual training costs that are based on your department training demand compare to a department’s allocated training budget.
Object Name	TRN_BUDGET_TBL
Navigation	Develop Workforce, Budget Training (GBL), Setup, Department Budget Table, Department Budget
Prerequisites	Before you can set up a department budget, you must create budget periods in the Budget Period Table.
Access Requirements	Enter a Budget Period, Business Unit, and Department.

Department Budget

Budget Period: K1999CALYR **Business Unit:** US006 GBI BU for US006

Department: KU001 Human Resources

***Description:**

Short Description:

Allocation Date:

Originating Emplid: Locherty, Betty

Budget Amount:

Department Budget page

The system displays the **Budget Period**, **Business Unit**, and **Department** that you selected. These fields are for information only.

Enter a **Description** and **Short Description** of the budget.

Enter the **Allocation Date** of the budget. This is the date that you allocate the budget to the department. The **Originating Emplid** (originating employee ID) is the ID of the person who allocated the budget.

For each department, you can enter a **Budget Amount** in the appropriate currency. The currency that you specify here will be used when you compare the actual and budget costs by department. The system also uses it as the currency default value on pages where the Budget Training process calculates department budget costs to ensure that costs and budget are in the same currency.



For more information about base currency and how it works in budget training, see Setting Up the Training Cost Currency in this section.

Defining Training Requirements

Once you've set up budget periods and defined department budgets, the next step is to assess the training demand in your organization. In order to create a realistic training budget, you must determine how much training you plan to provide for your workforce. In other words, you need to determine how many employees want or need to take courses or participate in training programs and how many of those who want training your organization can afford to train. Once you know how many employees need to take a management training course, then you can figure out the cost to train all of the students that need to take a course or training program. Once you've established that amount, you can compare the cost of the training demand to your proposed training budget and either adjust your budget amount or cut back on who can and who can't take the course.

With the Budget Training module, you can identify your training demands on three levels: global (for your whole organization), departmental, and employee. This enables you to establish training demand at whatever level works best for your organization. If you work in a decentralized way, you'll probably want to use departmental or employee level forecasting. If you operate in a more centralized way, you may choose to work out the demand for training at the global level.

Overview of Training Demand Planning

To determine your organization's training demand, you can build profiles of employees with similar qualities who need to take the same training course(s). A profile is simply a template, which you create, that determines how many employees in your organization need to be trained in a certain area, based on the criteria that you specify. For example, suppose that managers in your customer support department need to take your organization's Time Management course. You can create a profile template that looks for all employees in the customer support department who have a manager's job code and who possess a competency, such as time management, with a proficiency level of Low. You could also create a profile that excludes employees in other departments or job codes or who have a high proficiency rating in time management. You need define your profiles only once—you can use profiles on an ongoing basis every time you need to check training demand for a new budget period. You can create and maintain as many profiles as you need to assess your training demand.



For more information about setting up profiles, see [Setting Up Demand Profiles](#).

Determining Training Demands for Your Organization

The PeopleSoft Budget Training module offers four ways to establish your training demand. Demand is the actual number of employees that you decide need to be trained. The four methods are:

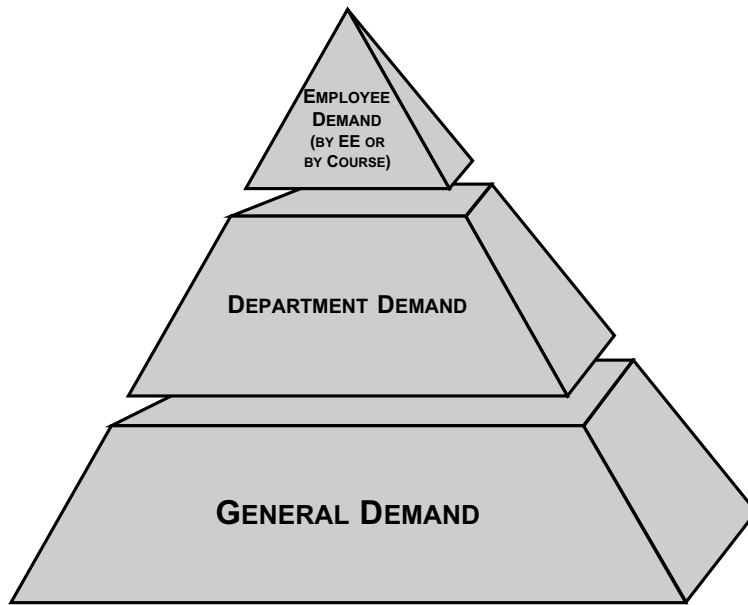
<i>Demand Method</i>	<i>Purpose</i>
By General Demand	General Demand is the number of employees to be trained in certain departments and for certain job codes.
By Departmental Demand	Departmental Demand represents the number of employees to be trained in a specific course for a particular department.
By Employee Demand	Employee Demand defines the training requirements for individual employees. You select these employees by Employee ID.
By Employee Demand by Course	Employee Demand by Course enables you to gather the number of employees to be trained in a particular course, selected by Course Code.



All Demands, at whatever level, are established for a particular Budget Period.

Using these four methods, you can get everything from a large overview of the training needed by your organization down to the exact training needs of a single employee. You can establish just one type of demand, or one of each. For example, you could define general demands only and not work with Departmental Demands or Employee Demands. You can still set up training budget scenarios and come up with a training plan using just one or all four methods.

The Demand pages also determine the costs associated with a demand for training in a particular course, not just how many employees need the training, but the cost to your organization in terms of wages or lost billable time. You'll use the training demand pages to determine a key component of your training budget: the employee cost to your organization for putting employees into a training course.



Understanding the layers of your organization's training needs

For each of the demand components, you first define who in your organization should be included when the system calculates the demand for training for a particular course. On the second page, you'll determine the cost for training these employees for a particular demand. This cost amount will be either the *average* training cost, if you're working with a general or department demand, or the specific cost per employee, if you're working on the Employee Demand or Employee Demand by Course components.

Using the Department Tree to Populate Departments

In the Budget Training Business Process, when you set up components of your organization's training budget process that reference department information, such as Department Views, demand Profiles, and General and Department Demands, the system enables you to make use of your Department Security Tree. Here is an example page:

Profile Directly

Business Unit: GBIBU **Profile ID:** KFINGBI **Profile Creation Date:** 02/06/2000

Description:

Short Description:

Department		Tree		Job Code	
<input type="text" value="KU005"/> <input type="text" value="Finance"/>	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="button" value="🔍"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="KU006"/> <input type="text" value="Sales Administration"/>	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="button" value="🌳"/>		
<input type="text" value="KU007"/> <input type="text" value="Business Services"/>	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="button" value="+"/> <input type="button" value="-"/>	<input type="button" value="🌳"/>		

Example page using department tree to populate departments

The Department Tree feature enables you to enter a parent department on the Department Security Tree on the page and include any child departments in departmental views, profile templates and training demand definitions *automatically*, using two **Tree** column buttons.



Click the **Expand** button to automatically add related departments specified in the Department Tree to the list on the page. This enables you to add several departments to the list in one step.

In the example above, if you want to form a profile including all the Finance departments, click the **Expand** button next to the department **KU005**. All departments reporting to the Finance department would automatically appear on the list. This enables you to add departments lower in the tree hierarchy automatically. If you want all departments but one, click the **Expand** button, and then delete the one department that you don't want.



Click the **Collapse** button to delete related departments from the list. The system deletes only the departments that you added using the **Expand** button. Departments that you added manually remain on the list, even if they are related departments.

You can also enter Departments by manually inserting a department row instead of using the **Expand** and **Collapse** buttons. The system displays two different symbols to indicate if you entered a Department row using the Expand/Collapse Department Tree option or manually.



The **Tree** symbol indicates that you added this department to the list by using the **Expand** button.



The **Person** symbol indicates that you added this department to the list manually.

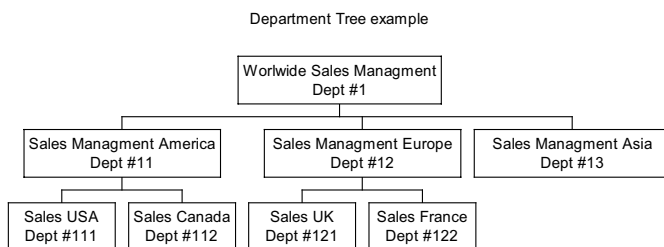


For more information about the use of security trees, see *Administering Security*.

For example, when you establish the number of employees in your organization that need training for a particular course by creating a General Demand, if you want to specify a demand for your own department and no others, you need enter only your department number and the number of people in that department that you want to train.

However, if you want to train people in each department for which you are responsible, you enter the Department ID for the parent Department and click the **Expand** button. The system creates a new data row for each department below the parent department according to the Department Security Tree.

For example, the Expand process includes every level in the Department Tree shown below that is a child to Worldwide Sales Management Dept. #1.



Expand department tree example

If you don't want to train employees in Sales Management America USA, Dept #11, you remove that department from the Department list using the **Collapse** button for that Department row. When you do this, the system deletes any departments that report to the selected department. In the example, if you click the **Collapse** button for Dept #11, the system removes Dept #111 and Dept #112.

Setting Up Demand Profiles

You can build profiles using two different methods—dynamic and static:

- If you know that every employee in a particular department with particular job code should enroll in a training program, then use the Profile Directly Page to create a dynamic profile template. As departments change and employees move into different jobs, your profile population changes, too.

- If you need to assess the training demand for employees who don't fit readily into the Department/Job Code criteria, then use the Profile by Criteria option. For example, if you wanted to search for employees in a particular Department and Job Code with certain competencies, then you'd use the Profile by Criteria page. This creates a static template.



You use the profile templates that you define here to create general demands for your organization, so you'll need to set these up before you can work with the demand pages.

Profile Directly Page

Usage	Use the Profile Directly page to create a profile based on a list of department and job codes.
Object Name	TRN_PROFILE_CREATE
Navigation	Develop Workforce, Budget Training (GBL), Use, Profile Directly, Profile Directly
Prerequisites	None
Access Requirements	Enter a Business Unit and a Profile ID.

Profile Directly

Business Unit: US004 **Profile ID:** KHRUS004 **Profile Creation Date:** 06/09/2000

Description:

Short Description:

Department View All First 1 of 1 Last

Department	Tree	
<input type="text" value="KU001"/> <input type="text" value="Human Resources"/>	+ -	+ -

Job Code View All First 1 of 5 Last

<input type="text" value="KU007"/> <input type="text" value="HRIS Specialist"/>		+ -
<input type="text" value="KU035"/> <input type="text" value="Human Resource Analyst"/>		+ -
<input type="text" value="KU100"/> <input type="text" value="HR Representative"/>		+ -
<input type="text" value="KU101"/> <input type="text" value="HRMS Analyst"/>		+ -
<input type="text" value="KU102"/> <input type="text" value="HR/Payroll Analyst"/>		+ -

Profile Directly page

Enter a **Description** and a **Short Description** for the profile you're creating.

In the left group box, select the **Department** that you want to include in your training profile template. To include both the Department that you specify and all child departments to that Department on the Department Tree, you can use one of the following buttons.



Click the **Expand** button to automatically add related departments specified in the Department Tree to the list on this page. This enables you to add several departments to the list in one step.



Click the **Collapse** button to delete related departments from the list. The system deletes only the departments that you added using the **Expand** button. Departments that you added manually remain on the list, even if they are related departments.



For more information about using these buttons, see *Using the Department Tree to Populate Departments*.

In the group box on the right, select the **Job Codes** for the departments you specified that have training requirements.

By creating this list of departments and job codes, you are identifying positions within your organization that have training needs. You can save this profile as a template and reuse it for future budget periods. Whenever you reference this profile template to establish your training demand for a course, the system automatically includes any employees who fit this profile.



While the profile always gathers up the employees in these departments and jobs, remember that the number of employees will change over time as the department headcount changes and as employees change Job Codes.

Defining Demand Profiles by Criteria

Use the Profile by Criteria component to create a training profile template that defines a group of employees who need training using more specific criteria than Department and Job Code. For example, you could create a training demand profile that gathers all employees in a Department and Job Code with a certain competency.

Identifying workers who need training using competencies is useful because you can target workers with certain competencies and proficiency levels for training in courses that can improve their competency level. Or you can exclude employees who already possess a competency from the group of employees who should take a training course to improve that competency. As you can see, while you can specify what to *include* in your profile, you can also specify *exclusions* on the Profiles by Criteria page. In effect, you can define your criteria by inclusions or exclusions or a combination of both. You can also define multiple criteria statements that the system processes

in sequence, to refine your profile even further. How simple or complex your profile criteria are is up to you and your training needs.

By pooling training demand information from the department, job code and competency areas, you'll be able to accurately define the training need for this employee group profile in your organization. The profile you create becomes a template that you can reuse in the future as you reassess training demands. You specify the criteria on the Profile Criteria page and view the resultant profile on the Profile Selection page.

Profile by Criteria - Profile Criteria Page

Usage	Use the Profile Criteria page to define the criteria that you want to use to include or exclude employees in your training plans.
Object Name	TRN_PROFILE_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Use, Profile by Criteria, Profile Criteria
Prerequisites	Before you can use this page to include competencies in your selection criteria, you must set up your competency codes on the Competency Table Setup Page.
Access Requirements	Enter a Business Unit and a Profile ID of up to 10 characters.

Profile by Criteria - Profile Criteria page (1 of 2)

Profile by Criteria - Profile Criteria page (2 of 2)

Enter a **Description** and a **Short Description** for the Profile ID. The system displays the description information that you enter here on any pages or reports that reference this Profile ID, so your descriptions should identify what this profile does.

Select the **Delayed** check box if you want to delay processing the demand profile until later. Depending on your requirements, it is possible for this profiling to take some time, so postponing it might be a good option to consider. If the **Delayed** check box is cleared, the system executes the profile criteria when you save the page.

If you choose to postpone this process, you can perform it at a later time by running the Create Delayed Profile process. When this process has completed, you view the list of departments and job codes selected for training from the Profile Selection page.

Or

In the **Or** group box, you can build your employee training profile template using one or more selection criteria statements that you organize by **Criteria #** (criteria number). The system processes your selection criteria statements based on their criteria numbers, starting at statement **1** and moving sequentially through the statement list. When you define a new profile, the system automatically sets the **Criteria #** to **1**, to indicate that you are getting ready to enter your first criteria statement.

Select the **Link with Competencies** check box if you want to include competencies as part of your criteria statement. When you select this check box, the system makes the **Competency** fields available for entry. Select the **Competency** and select a competency rating of **Level**. You define competency codes on the Competency Table and the associated rating levels on the Rating Model Table. When you complete the **Competency** fields, the system includes or excludes workers with competencies at the rating that you specified.

Enter a new **Criteria #** to define additional profile criteria statement.



If you write several sequentially numbered criteria statements, you can reorganize them by setting the number for each statement and then saving the page. The system sorts the statements and displays them according to the **Criteria #**.



For more information about working with Competencies and understanding proficiency levels assigned to workers, see Managing Competencies.

Include

In the **Include** group box, select the **Department**, **Job Code**, and **Competency** that you want to include in the profile. To include both the Department that you specify and all child departments to that Department on the Department Tree, you can use one of the following buttons:



Click the **Expand** button to automatically add related departments specified in the Department Tree to the list on this page. This enables you to add several departments to the list in one step.



Click the **Collapse** button to delete related departments from the list. The system deletes only the departments that you added using the **Expand** button. Departments that you added manually remain on the list, even if they are related departments.



For more information about entering Departments on this page automatically, using the Department Tree feature in Budgeting Training, see *Using the Department Tree to Populate Departments*.

Exclude

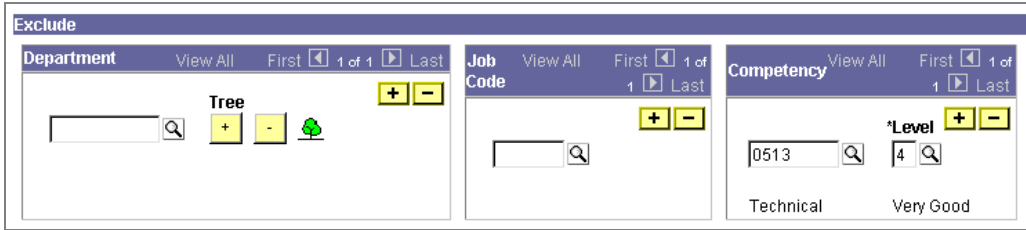
In the **Exclude** group box, select the **Department**, **Job Code**, and **Competency** that you want to exclude from the profile. Use the **Expand** and **Collapse** buttons to add and remove departments on your department tree.

Understanding How the Criteria Impacts Profile Processing

In the following example, the selection includes all employees in Department **KC003**, Information Systems, who are assigned to Job Code **KC014**, Sys Analyst.

Include criteria statement

In the same selection criteria statement, you might want to exclude any employees with a high rating (level **4**) in the competency **0153**, Technical Knowledge, as follows.



Exclude criteria statement

When you save the page the system starts to process your search and view the numbers of employees who qualify if the **Delayed** check box is cleared. The system displays a warning message before it begins the process of gathering the employees who match your profile template.



Warning! This process can be long. You can use the process scheduler to execute the profile create.

This profile can now act as a template that you can run again and again during the current or next budget period, to obtain a list of the qualifying employees who match your selection criteria for this profile.



You have to save the contents of this page and execute the profile process, to view the selection results in the Profile by Criteria - Profile Selection page.

Profile by Criteria - Profile Selection Page

Usage	Use the Profile Selection page to view the number of employees selected by department, and job codes according to the criteria you selected on the Profile Criteria page.
Object Name	TRN_PROFILE_VIEW
Navigation	Develop Workforce, Budget Training (GBL), Use, Profile by Criteria, Profile Selection
Prerequisites	You can view the results on this page only if you've run the profile process for a Profile ID that you defined on the Profile Criteria page.
Access Requirements	Enter a Business Unit and a Profile ID.

Profile Criteria		Profile Selection	
Profile ID:	KGBIHR	HR US Global Business Inst	Profile Creation Date: 02/06/2000
		View Selection	
View All First 1 of 1 Last		View All First 1-5 of 5 Last	
Unit	Department	Nbr Empl	Job Code
US004	KU001 Human Resources	6	KU051 Administrative Assistant 1
			KU077 Consultant - Senior 2
			KU098 Benefits Specialist 1
			KU112 Manager-Finance 1
			KU120 Data Entry Clerk 2
Total Count			
6			6

Profile by Criteria - Profile Selection page

The system displays the **Profile ID**, **Description**, and **Profile Creation Date** for your reference. The **Profile Creation Date** indicates the date that the system last processed this Profile ID. When you rerun the profile process, the system updates the creation date information.

In the group box on the left, the system lists the Business **Unit**, **Department** code and **Nbr Empl** (number of employees) that match the Department profile criteria. If you entered more than one department in the selection criteria, then the system displays the number of matching employees for each department code.

In the group box on the right, the system displays the number of employees found in each **Job Code** that you specified for this Profile ID on the Profile Criteria page.

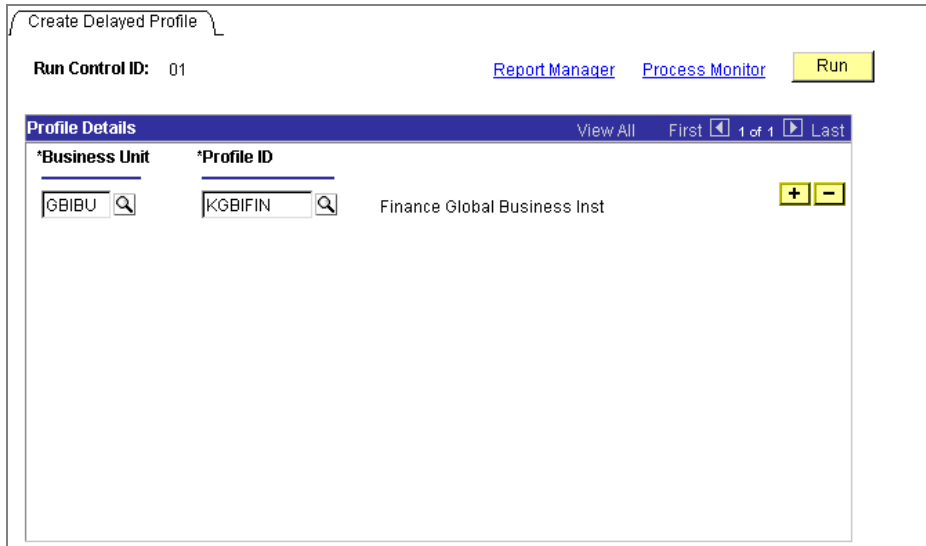
The **Total Count** indicates the total number of employees that match each of the profile criteria for this Profile ID.

You can use this page to determine the effectiveness of your profile criteria selection statements. If you're resultant employee count is too high or too low, go back to the Profile Criteria page, make any necessary changes to the selection criteria for this Profile ID, rerun the process, and return to this page to evaluate your results.

Create Delayed Profile Page

Usage	Use the Create Delayed Profile page to run the process that creates the demand profile, based on the selection criteria that you set up on the Profile By Criteria - Profile Criteria page. You need to run this process only if you selected the Delayed check box on the Profile Criteria page.
Object Name	RUNCTL_TRN009
Navigation	Develop Workforce, Budget Training (GBL), Process, Create Delayed Profile, Create Delayed Profile
Prerequisites	Before you can run this process, you must set up the demand profile

	selection criteria on the Profile by Criteria - Profile Criteria Page.
Access Requirements	Enter a Run Control ID.



Create Delayed Profile page

The system displays the **Run Control ID** that you selected.

Select the **Business Unit** for the profile from the list of valid values. Select the **Profile ID** from the list of demand profiles you have created using the Profile by Criteria - Profile Criteria Page.

Click **Run** to run this request. Process Scheduler runs the Create Delayed Profile process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

Defining Global Training Demands

The General Demand pages will help you determine the number of employees throughout your organization that need training in a certain course. The General Demand component consists of two pages:

General Demand Page. Use the General Demand page to define the nature of the training need. These demands address various populations defined by groupings of Departments and Job Codes.

Training Population Page. Use the Training Population page to define the specific employee population with the training need (demand). You define your organization’s training demand by Budget Period and Business Unit.

General Demand Page

Usage	Use the General Demand page to view course details and general information about the demand, including the demand priority and the originator of the demand.
Object Name	TRN_DEMAND_GNRL_1
Navigation	Develop Workforce, Budget Training (GBL), Use, General Demand, General Demand
Prerequisites	Before you can use this page, you must set up Budget Periods on the Budget Period Table Page.
Access Requirements	Enter a Budget Period, a Business Unit and a Demand ID.

General Demand Training Population

Budget Period: K2000CALYR **Business Unit:** US004 **Frozen**

Demand ID: 000010 **From Date:** 01/01/2000 **Thru Date:** 31/12/2000

Course Information

Category: MANAGEMENT **Subcat:** SUPERVISN **Not in Catalog**

Course Code: K006 Conducting Performance Reviews

Demand Information

Description: **Creation Date:**

Short Description: **Revision Date:**

Originator: **OrigEmplid:**

Demand Priority: **Expiration Date:**

General Demand page

The system displays the **Budget Period**, **Business Unit**, and **Demand ID** that you selected. The Demand ID defaults to *NEW* when you create a demand for the first time. You can accept the system-generated ID or enter one manually. The system generates a sequence number based on the last demand ID stored in the Installation Table.



For more information about setting up automatic numbering using the Installation Table, see Installation Table - Last ID Assigned Page.

The **From Date** and **Thru Date** dates correspond to the **Budget Period** that you specified. If the **Frozen** check box is selected, this indicates that the budget period is frozen and that you cannot modify the general demand information on the page for this Demand ID and Budget Period. If you attempt to modify a frozen budget, the system displays a warning message.



For more information about working with Frozen budgets, see Freeze Budget Period Page.

Course Information

In the **Course Information** group box, specify the course that this training demand applies to by select a course **Category**, **Subcat** (subcategory), and **Course Code**. If you don't know the category, subcategory, or course code, use the system default, **UNKNOWN**.



You cannot select a Subcategory Code until you've indicated a Course Category.

Select the **Not in Catalog** check box if the training course hasn't been defined on the Catalog Table. When you first enter the page, all of the Course Information values default to **UNKNOWN**.

Demand Information

The system populates the **Description** and **Short Description** fields after you enter the category, subcategory, and course code. The system displays the description information whenever the Demand ID is referenced on a page or report.

The **Creation Date** defaults to the system date, usually today's date, which you can change if necessary. Later, when you make changes to the original demand profile, you can enter a **Revision Date**. While you shouldn't update the **Creation Date** for auditing purposes, you can update the Demand ID **Revision Date** anytime you make a change to the demand.

Indicate whether the demand **Originator** (the person who created the demand) is an **Employee** or **Supervisor**.

Select the **OrigEmplid** (originator employee ID) of the originator from the list of valid values.

You can also specify a **Demand Priority** for the demand; valid values are **Low**, **Medium**, and **High**. When you're building global scenarios using the Create Global Scenario processes, you can specify that the system include only demands that have a certain Demand Priority in the scenarios.



For more information about working with and defining global scenarios and how they fit into your training administration and budget training business processes, see [Approved in Global Scenario - Approved by Demands Page](#).

Enter an **Expiration Date** to indicate the last possible date for meeting this training demand. This is for informational purposes only, but it can be useful if you decide to mark a demand as being obsolete after a specific time.

Training Population Page

Usage	Use the Training Population page to define the group of people who
-------	--

	need training in the course that you selected on the General Demand page. Using this page, you can establish your Total General Demand Amount and give the system additional parameters to use to calculate the average cost for training employees for this demand. The calculation here determines the employee cost of training and doesn't include the course costs themselves, such as instructor fees and facility costs.
Object Name	TRN_DEMAND_GNRL_2
Navigation	Develop Workforce, Budget Training (GBL), Use, General Demand, Training Population
Prerequisites	You must set up employee training costs and budgets before you can set up training demands.
Access Requirements	Enter a Budget Period, a Business Unit, and a Demand ID.

Training Population page (1 of 2)

Training Population page (2 of 2)

The system displays the **Budget Period**, **Business Unit**, and **Demand ID** that you entered. If the **Frozen** check box is selected, this indicates that the budget period is frozen and that you cannot modify this general demand information on the page for this Demand ID and Budget Period. If you attempt to modify a frozen budget, the system displays a warning message.

The system also displays these budget period details: **From Date**, **Thru Date**, **Created date**, and **Revision Date**. These fields are for information only.

Use Profile as a Template

Click **Use Profile as a Template** if you want to import the job codes and departments that you previously set up in a profile. When you click the link, the system displays the Profile Template Page where you select the profile to use.

If you don't enter any Job Codes or Department information in the **Job Code** and **Demand** group boxes on this page, then the calculation is based solely on the profile that you specified.

Empl. Training Budgeted Cost (employee training budgeted cost)

The **Empl. Training Budgeted Cost** is the average cost of training the selected population. The system calculates this value when you click the **Compute** button, using the costs that are associated with the specified job codes on the Job Code Training Cost Page. The **Empl. Training Budgeted Cost** calculation looks like this:

$$\text{Employee Training Budgeted Cost} = (\text{Job Code Training Cost} * \text{Number of people in this Job Code}) \text{ for all Job Codes entered in the Job Code field on this page} / \text{Total number of people in the General Demand.}$$

Note. You specify the default currency for Business Units for a Budget Period on the Budget Period Table. Budgets for your organization are automatically converted to the default base currency for your organization that you establish on the Training Base Currency Table. The system always converts all training costs to the base currency to calculate training costs.

Unit

The system displays the cost unit associated with the amount in **Empl. Training Budgeted Cost**.

Compute

Click the **Compute** button to populate the **Empl. Training Budgeted Cost** field with the average job code salary cost figures, using the job codes defined in the **Job Code** group box.

The system pulls the costs associated with the specified job codes from the Job Code Training Cost Table, and averages the costs together to come up with an **Empl. Training Budgeted Cost** figure. For this process to work, you need to have entered the job codes for this demand and it's associated costs on the Job Code Training Cost Page.

Job Code

In the **Job Code** group box, specify the job codes that are included this training demand. When the system calculates the training demand, only employees with the selected job code are considered. The system also uses the **Job Code** information that you enter here to calculate the average cost to train employees for this demand.

Demand

In the **Demand** group box, specify the departments that you want to include when calculating the demand for this course. Use the **Tree** column to populate the department as necessary.

Department

Select the **Department** that you want to include when calculating the demand.

The person symbol appears beside the departments that you added to the list manually. Use the **Expand** button to populate the department as necessary.

When you select the department, the system displays the department description. If you need to enter country-specific information, the system links the department name to the Department - Country page. Click the department name to view the Department - Country Page where you enter information required by your local country.



Click the **Expand** button to automatically add related departments to the list on this page. This enables you to add several departments to the list in one step.

The tree symbol appears beside the departments that you added using this button.



Click the **Collapse** button to delete related departments from the list. The system deletes only the departments that you added using the **Expand** button (indicated by the tree symbol). Departments that you added manually (indicated by the person symbol) remain on the list, even if they are related departments.

For more information about the use of the **Expand** and **Collapse** buttons in the **Tree** column, see Using the Department Tree to Populate Departments.

Demand

Enter the number of the employees to be trained for each of the departments selected. This is an optional field, but the more precise the information you can provide, the more realistic the subsequent simulation and pricing will be.

Warning! If you don't enter a Demand amount, your computed costs throughout the Budget Training business process will be incorrect. Remember, all the computed cost are based on the Demand amounts that you enter here.

Total General Demand

The **Total General Demand** field is required for each population demand. The system uses the **Total General Demand** amount when it calculates the average cost of training employees for this demand.



Click the **Summation** button to move the sum of all the individual Department Demands to **Total General Demand**. If you make changes to the **Demand** fields, you must click this button to update the **Total General Demand** before you can save the page.

Profile Template Page

Usage	Use the Profile Template page to specify the profile that you want to use to populate the General Demand page.
Object Name	TRN_PROF_TMPLT_SEC
Navigation	To access the page, click Use Profile as a Template on the General Demand - Training Population page.

Profile Template page

Profile Type

Select the **Profile Type**:

Directly: Use this option to select a profile that you created using the Profile Directly Page.

By Criteria: Use this option to select a profile that you created using the Profile by Criteria pages. This method is particularly useful if you need to determine which people in your organization need to be trained based on a set of criteria—in other words, select all people who are in this department list and have a low rating in the time management competency.

Profile ID

Select the profile from the list of valid profiles.

When you click **OK**, the system calculates the training cost using the Job Codes list selected in the specified Profile and the number of people selected for each Job Code and displays the average training cost for the profile population in the **Empl. Training Budgeted Cost** (employee training budgeted cost) field on the General Demand page.

Department - Country Page

Usage	Use the Department - Country page to enter country-specific department information that is required for the general demand that you have set up on the Training Population page.
Object Name	TRN_DPT_DMD_SEC
Navigation	To access this page, click the department name on the General Demand - Training Population page.

The screenshot shows a web form titled 'France' with a dropdown arrow. Below the title is a 'Distribution by' section. Under 'Gender', there are two rows: 'Female:' with an input field and 'Male:' with an input field. Under 'Socio Professional Category', there are five rows: 'Executive:', 'Manager:', 'Office Worker:', 'Qualified Worker:', and 'Non Qualified Worker:', each with an input field. At the bottom of the form are two buttons: 'OK' and 'Cancel'.

Department - Country page

France

Use the **France** group box to define how your training demand is split by gender and professional category. Remember, the sum of male and female employees must equal the total general demand that you specified on the Training Population page. Similarly, the sum of all the professional categories must also equal the total general demand.

Gender

Female Enter the number of female employees who make up the demand shown on the Training Population page.

Male Enter the number of male employees who make up the demand shown on the Training Population page.

Socio Professional Category

Executive Enter the number of employees classified as Executive who make up the demand shown on the Training Population page.

Manager Enter the number of employees included in the demand who are classified as managers.

Office Worker Enter the number of employees included in the demand who are classified as office workers.

Qualified Worker Enter the number of employees included in the demand who are classified as qualified workers.

Non Qualified Worker Enter the number of employees included in the demand who are classified as non qualified workers.

Defining Departmental Training Demands

The Department Demand page enables you to determine the number of employees in a department that need training in a certain course.

Department Demand Page

Usage	Use the Department Demand page to define the number of employees to be trained in a specific course or set of courses for a particular Department during a specified Budget Period.
Object Name	TRN_DEMAND_DEPT
Navigation	Develop Workforce, Budget Training (GBL), Use, Department Demand, Department Demand
Prerequisites	You must set up your training costs and budgets before you can set up

	department demands.
Access Requirements	Enter a Budget Period, a Business Unit, and a Department ID.

Department Demand

Budget Period: K2000CALYR Business Unit: CAN01 DeptID: KC001 Frozen

View All First 1 of 1 Last

Course Information

Category: MANAGEMENT Subcat: SUPERVISN Not in Catalog

Course Code: K006 Conducting Performance Reviews

Demand ID: 000009 Creation Date: 01/06/2000 Revision Date:

*Description: Conducting Performance Reviews

Short Description: Perf Rewvs Demand: 5

Originator: Supervisor OrigEmplid:

Demand Priority: Medium Expiration Date:

Employee Cost: 0.00 USD Cost Unit: Pers/Hour

Job Code View All First 1 of 1 Last

Department Demand page

The system displays the **Budget Period**, **Business Unit**, and **DeptID** (department ID) that you selected. If the budget period is frozen, the system selects the **Frozen** check box. These fields are for information only.

Course Information

In the **Course Information** group box, specify the course for this training demand. If you don't know the **Category**, **Subcat** (subcategory), or **Course Code**, use the system default, **UNKNOWN**.

Category Select the **Category** that the course belongs to.

Subcat Select the subcategory that the course belongs to.

Course Code Select the **Course Code** from the list of valid courses.

Add as many courses as needed to adequately represent the department's training needs. To add another course, insert an additional data row.

Not in Catalog Select the **Not in Catalog** check box if the training course hasn't been defined on the Catalog Table.

Demand ID	<p>The Demand ID defaults to <i>NEW</i> when you create a new demand. The system generates a sequence number based on the last demand ID stored in the Installation Table.</p> <p>If you need to enter country-specific information, the system links the Demand ID to the Department - Country page. Click the Demand ID to view the Department - Country Page, where you enter information that is required by your local country.</p>
Creation Date	<p>If you're creating a new department demand, enter the Creation Date. The system defaults Creation Date to the system date, which you can change if necessary.</p>
Revision Date	<p>If you're making changes to an existing demand, enter a Revision Date. While you shouldn't update the Creation Date for auditing purposes, you can update the Revision Date anytime you make a change to the demand.</p>
Description	<p>The system populates the Description after you enter the Category, Subcat, and Course Code.</p> <p>The system displays the description information whenever the Demand ID is referenced on a page or report.</p>
Short Description	<p>The system populates the Short Description after you enter the Category, Subcat, and Course Code.</p> <p>The system displays the description information whenever the Demand ID is referenced on a page or report.</p>
Demand	<p>Enter the number of employees in the selected department that need to take the training course.</p>
Originator	<p>Select the Originator from following options: <i>Employee</i> and <i>Supervisor</i>.</p>
OrigEmplID (originating employee ID)	<p>Select the employee ID of the person who created the demand.</p>

Demand Priority

Select a **Demand Priority** from the following options:
Low, Medium, and High.

When you're building global scenarios using the Create Global Scenario processes, you can specify that the system include only demands with a certain priority in the scenarios.

For more information about working with and defining global scenarios and how they fit into your training administration and budget training business processes, see "Planning Training Budgets for Your Organization".

Expiration Date

Enter the last possible date for meeting this training demand. This is for information only, but it can be useful if you decide to mark a demand as being obsolete after a specific time.

Employee Cost

Enter the **Employee Cost** (employee training cost) and the currency it is tracked in. This cost will be used during the simulation for pricing the scenarios and the training plan.

You specify the default currency for Business Units for a Budget Period on the Budget Period Table Page. Budgets for your organization are automatically converted to the default base currency for your organization that you establish on the Base Currency Page.

Cost Unit

Select the **Cost Unit** that is associated with the amount in **Employee Cost**.

For more information about how the cost unit impacts the way that the system calculates demand costs, see "Planning Training Budgets for Your Organization"

Job Code**Job Code**

Before you calculate your employee cost, you can select one or more job codes that the system should use when it calculates the average employee cost for training for this Demand. When you select job codes here, the system uses the Job Code Training Cost amount on the Job Code Training Cost Table, when it calculates the Employee Training Cost. The system takes an average of the costs for all the Job Codes that you specify.

Department - Country Page

Usage	Use the Department - Country page to enter the country-specific department information that is required for the department demand.
Object Name	TRN_DPT_DMD_SEC1
Navigation	To access this page, click the Demand ID on the Department Demand page.

Department - Country page

France

Use the **France** group box to define how your training demand is split by gender and professional category. Remember, the sum of male and female employees must equal the demand that you specified on the Department Demand page. Similarly, the sum of all the professional categories must also equal the total demand.

Gender

Female

Enter the number of female employees who make up the total training demand shown on the Department Demand page.

Male

Enter the number of male employees who make up the total training demand shown on the Department Demand.

Socio Professional Category

Executive

Enter the number of employees included in the Department Demand, who are classified as Executives.

Manager	Enter the number of employees included in the department demand who are classified as managers.
Office Worker	Enter the number of employees included in the department demand who are classified as office workers.
Qualified Worker	Enter the number of employees included in the department demand who are classified as qualified workers.
Non Qualified Worker	Enter the number of employees included in the department demand who are classified as non qualified workers.

You can print a Training Plan: Distribution report that shows how your training demands are distributed, by gender and professional category.

Entering an Employee's Training Demands

The Employee Demand pages enable you to identify the training needs of a particular employee by category/subcategory/course. The Employee Demand component consists of two pages:

Employee Demand Profile Page. Use the Employee Demand Profile page to specify the courses required for a selected employee.

Demand Details Page. Use the Demand Details page to enter the department and job code for the employee and to enter employee costs.

Employee Demand Profile Page

Usage	Use the Employee Demand Profile page to record the courses that the selected employee requires during the specific budget period, and enter audit information for the demand.
Object Name	TRN_DEMAND_EE_1
Navigation	Develop Workforce, Budget Training (GBL), Use, Employee Demand, Employee Demand Profile
Prerequisites	Before you can use this page, you must set up Budget Periods on the Budget Period Table Page.
Access Requirements	Enter a Budget Period, a Business Unit, and an EmplID.

Employee Demand Profile		Demand Details	
Budget Period:	K2000CALYR	Business Unit:	US004
EmplID:	KU0015	Espinosa,Carmichael	
<input type="checkbox"/> Frozen			
View All First 1 of 1 Last			
Creation Date:	05/01/2000	Revision Date:	
Demand ID:	000013	Empl Rcd#:	0
Description:	Espinosa,Carmichael		
Short Desc:	Espinosa,C		
Originator:	Supervisor	OrigEmplid:	
Demand Priority:	Medium	Expiration Date:	
From Date: 01/01/2000			
Thru Date: 31/12/2000			
Course Information			
Category:	MANAGEMENT	Subcat:	LEADERSHIP
Course Code:	K010	Leadership Skills for Managers	
<input type="checkbox"/> Not in Catalog			

Employee Demand Profile page

The system displays the Budget Period, Business Unit, and **DeptID** (department ID) that you selected. If the budget period is frozen, the system selects the **Frozen** check box. These fields are for information only. You must specify only the courses that the employee needs to take during the specified Budget Period.

The **From Date** and **Thru Date** fields indicate the beginning and the end of the budget period that you specified when you entered the page. The **Demand ID** is also displayed for your reference.

The **Creation Date** defaults to the system date, which you can change if necessary. Later, when you make changes to the original demand profile, you can enter a **Revision Date**.

Enter the **Empl Rcd#** (employee record number) to identify demands for employees who have been in more than one department and job code since joining the organization. By using the employee record number, you can enter employee demands against the correct department and job code.

The system populates the **Description** and **Short Description** fields for the employee demand, using the employee's name. The system displays the description information that you enter here for this employee demand ID on any pages or reports that reference the Demand ID.

Select the position of the demand **Originator** in the organization; valid values are *Employee* and *Supervisor*.

Select **OrigEmplid** (original employee ID) of the Originator.

You can also specify a **Demand Priority** for the demand; valid values are *Low*, *Medium*, and *High*. When you're building global scenarios, using the Create Global Scenario processes, you can specify that the system include demands with a certain priority only in the scenarios.



For more information about working with and defining global scenarios and how they fit into your training administration and budget training business processes, see [Approved in Global Scenario - Approved by Demands Page](#).

Enter an **Expiration Date** to indicate the last possible date for meeting this training demand. This is for informational purposes only, but it can be useful if you decide to mark a demand as being obsolete after a specific time.

Course Information

Specify the course that this training demand applies to by selecting a course **Category**, **Subcat** (subcategory), and **Course Code**. If you're unsure which course this demand is for, you can select the category and subcategory codes and leave the **Course Code** field blank.



You cannot select a subcategory code until you've indicated a course category.

Select the **Not in Catalog** check box if the training course hasn't been defined on the Catalog Table. When you first enter the page, the Course Information values default to **UNKNOWN**.

To enter additional courses that this employee needs to take during the specified budget period, place your cursor in the **Category** field, and insert new rows.

Demand Details Page

Usage	Use the Demand Details page to define additional employee demand details, including job code, department, and training costs.
Object Name	TRN_DEMAND_EE_2
Navigation	Develop Workforce, Budget Training (GBL), Use, Employee Demand, Demand Details
Prerequisites	You must complete the Employee Demand Profile before you can use this page.
Access Requirements	Enter a Budget Period, Business Unit and Employee ID.

Employee Demand Profile		Demand Details	
Budget Period:	K2000CALYR	Business Unit:	US004 <input type="checkbox"/> Frozen
EmplID:	KU0015	Espinosa,Carmichael	
		View All First 1 of 1 Last	
Creation Date:	05/01/2000	Revision Date:	
Demand ID:	000013	From Date:	01/01/2000
Job Code:	KU077	Thru Date:	31/12/2000
Department:	KU001	Empl Rcd#:	0
Unit Cost:	690.00	USD STUD/D	
*Job Code:	<input type="text" value="KU077"/>	Consultant - Senior	
*Department:	<input type="text" value="KU001"/>	Human Resources	
Empl. Training Budgeted Cost:	<input type="text" value="690.00"/>	<input type="text" value="USD"/>	Unit: <input type="text" value="Pers/Day"/>

Demand Details page

The system displays the **Budget Period**, **Business Unit**, and **EmplID** (employee ID) that you selected. If the budget period is frozen, the system selects the **Frozen** check box. These fields are for information only.

The system populates the following fields from the Employee Demand Profile page: **Creation Date**, **Revision Date**, **Demand ID**, **From Date**, and **Thru Date**. These fields are for information only.

The system populates the following fields from the employee’s job data: **Job Code**, **Department**, and **Unit Cost**.

You can select a **Job Code**, **Department**, and **Empl. Training Budgeted Cost** (employee training budgeted cost) that are different from those that are currently defined for this employee, for budget purposes. You might want to do this if you’re aware that at the time of this future budget period, the employee details will be different. For example, the employee may be transferring to another department and job with a different employee training budgeted cost.

Enter an **Empl. Training Budgeted Cost**, and indicate the currency that the cost is tracked in.

You specify the default currency for Business Units for a Budget Period on the Budget Period Table. Budgets for your organization are automatically converted to the default base currency for your organization that you establish on the Training Base Currency Table (TRN_BASE_CURRENCY).



For more information about how the system determines default display currency for employees, departments, and your overall organization, see Setting Up the Training Cost Currency.

Select the Cost **Unit** for the value in **Empl. Training Budgeted Cost**. Because you’re entering the cost to train the employee with respect to the employee’s wages, you could enter a cost unit of **Pers/Hours**, if you were entering their hourly wage, or **Pers/Day**, if you were entering the cost based on what the employee earns in a day.

Defining Employee Training Demand by Course

Use the Employee Demand by Course pages to define employee training demands by training courses. Using these pages, you can define a list of employees for a specific category, subcategory and course.

The Employee Demand by Course component consists of two pages:

Employee Demand by Course Page. Use the Employee Demand by Course page to specify the employees who need to attend the selected course.

Demand by Course Details Page. Use the Demand by Course Details page to enter the department and job code for the employee and to enter employee costs.

Employee Demand by Course Page

Usage	Use the Employee Demand by Course page to enter the employees who require the selected training course and to enter audit information for the demand.
Object Name	TRN_DEMAND_EECRS_1
Navigation	Develop Workforce, Budget Training (GBL), Use, Employee Demand by Course, Employee Demand by Course
Prerequisites	Before you can use this page, you must set up Budget Periods on the Budget Period Table Page.
Access Requirements	Enter a Budget Period, a Business Unit, and a Course Code.

Employee Demand by Course
Demand by Course Details

Budget Period: K1999CALYR	Business Unit: CAN01	<input checked="" type="checkbox"/> Frozen
Category: MANAGEMENT	Subcat: CAREER DEV	
Course Code: K003	Performance Management	<input type="checkbox"/> Not in Catalog

[View All](#) First ◀ 1 of 2 ▶ Last

+ -

Creation Date: <input type="text" value="07/02/1999"/> <small>BT</small>	Revision Date: <input type="text"/> <small>BT</small>	From Date: 01/01/1999
Demand ID: 000012		Thru Date: 31/12/1999
EmplID: <input type="text" value="KC0001"/> <small>Q</small>	Griffiths, Martina Rae	
Empl Rcd#: <input type="text" value="0"/> <small>Q</small>		
Description: <input type="text" value="Griffiths, Martina Rae"/>		
Short Desc: <input type="text" value="Griffiths"/>		
Originator: <input type="text" value="Supervisor"/>	OrigEmplid: <input type="text"/> <small>Q</small>	
Demand Priority: <input type="text" value="Medium"/>	Expiration Date: <input type="text"/> <small>BT</small>	

Employee Demand by Course page

The system displays the **Budget Period, Business Unit, Category, Subcat** (subcategory), and **Course Code** that you selected. If the course isn't in your training catalog, the system selects the **Not in Catalog** check box. If the budget period is frozen, the system selects the **Frozen** check box. These fields are for information only.

The system displays the **From Date** and **Thru Date** to indicate the beginning and the end of the budget period that you specified when you entered the page. The system also displays the Demand ID for your reference.

The **Creation Date** defaults to the system date, usually today's date, which you can change if necessary. Later, when you make changes to the original demand profile, you can enter a **Revision Date**.

Select the **EmplID** (employee ID) of the employee that needs to take the specified course. Insert a row for each employee who needs to attend the training course. Employees can come from any department that is associated with the **Business Unit** that you specified.

Enter the **Empl Rcd#** (employee record number) to identify the demands for employees who work in more than one department and job code for your organization. By using the employee record number, you can enter employee demands against the appropriate department and job code.

Enter a **Description** and **Short Description** for the demand.

Select the position in the organization of the demand **Originator** (the person who created the demand) in your organization; valid values are *Employee* and *Supervisor*.

Select the **OrigEmplid** (originating employee ID) of the originator.

You can also specify a **Demand Priority** for the demand; valid values are *Low, Medium, and High*.

The **Expiration Date** indicates the last possible date for meeting this training demand. This is for information only, but it can be useful if you decide to mark a demand as being obsolete after a specific time.

Demand by Course Details Page

Usage	Use the Demand by Course Details page to define additional employee details by course. For example, if you know that the employee will transfer to another department or job code during the budget period, and the training need should be allotted to the new department, then you can account for that change here.
Object Name	TRN_DEMAND_EECRS_2
Navigation	Develop Workforce, Budget Training (GBL), Use, Employee Demand by Course, Demand by Course Details
Prerequisites	You must complete the Employee Demand by Course page before you can use this page.

Access Requirements	Enter a Budget Period, a Business Unit, and a Course Code.
---------------------	--

Employee Demand by Course
Demand by Course Details

Budget Period:	K1999CALYR	Business Unit:	CAN01	<input checked="" type="checkbox"/> Frozen
Category:	MANAGEMENT	Subcat:	CAREER DEV	
Course Code:	K003	Performance Management		<input type="checkbox"/> Not in Catalog

View All
First
1 of 2
Last

Creation Date:	07/02/1999	Revision Date:	01/01/1999	+ -
Demand ID:	000012	Thru Date:	31/12/1999	
EmplID:	KC0001	Griffiths, Martina Rae	Empl Rcd#:	0
Job Code:	KC003	Senior Secretary		
Department:	KC001	Human Resources		
Unit Cost:	13.00	CAD	STUD/D	

*Job Code:	<input type="text" value="KC003"/> <input style="font-size: small;" type="button" value="Q"/>	Senior Secretary	
*Department:	<input type="text" value="KC001"/> <input style="font-size: small;" type="button" value="Q"/>	Human Resources	
Empl. Training Budgeted Cost:	<input type="text" value="23.00"/> <input style="font-size: small;" type="button" value="CAD"/> <input style="font-size: small;" type="button" value="Q"/>	Unit:	<input type="text" value="Pers/Month"/>

Demand by Course Details page

The system displays the employee information that you entered on the Employee Demand by Course page so that you can easily determine which employee you're entering additional data about here.

You can select a different **Job Code** or **Department** for this employee, for this training demand and Budget Period. You might want to do this if you're aware that at the time of a future budget period, the employee details will be different. For example, the employee may be transferring to another department and job during the Budget Period, and this would result in a different employee training budgeted cost.

Enter an **Empl. Training Budgeted Cost** (employee training budgeted cost), and indicate the currency that the cost is tracked in.

You specify the default currency for Business Units for a Budget Period on the Budget Period Table. Budgets for your organization are automatically converted to the default base currency for your organization that you establish on the Training Base Currency Table (TRN_BASE_CURRENCY).



For more information about how the system determines default display currency for employees, departments, and your overall organization, see Setting Up the Training Cost Currency.

Indicate the Cost **Unit** for the cost in **Empl. Training Budgeted Cost**. Because you're entering the cost to train the employee with respect to the employee's wages, you could enter a cost unit of

Pers/Hour, if you are entering the hourly wage, or *Pers/Day*, if you enter the cost based on what the employee earns in a day.



For more information about how the cost unit impacts the way that the system calculates demand costs, see *Creating Global Scenarios*.

Planning Training Budgets for Your Organization

Once you have defined your training budgets and determined the training demand for your organization, the next stage is to calculate the cost of the training demands and adjust budgets or cut back on the training demands as necessary. This section describes how you use the budgeting tools provided in PeopleSoft Human Resources to help you plan your budgets, approve selected demands, and freeze your training plan.

Overview of the Training Planning Process

In Defining Training Requirements you learned how to create training demands for your organization at three levels, general demands (for the whole organization), department demands, and employee demands. Once you know how many employees need to take each training course, you'll want to find out the total cost of those demands. Having established that amount, you can compare the cost of the training demand to the proposed training budget that you set up for your departments on the Department Budget Table Page.

The Scenario budgeting tools enable you to set the level of employee demand that you can afford during a specified budget period. A budget scenario is simply a budget plan. You can define as many scenarios as you need, to represent different possible training budget plans. Scenarios enable you to perform what-if analysis, to help you work out which budget plan works best for your organization.

You work with these scenarios to simulate how different budgeting and demand decisions impact your training programs and assess their financial impact on the organization before you reach a final decision on your training budgetary plans and select the best budget plan scenario to balance costs while meeting your workforce training needs.

Scenarios enable you to create virtual training plans that you can activate. Activating a training plan scenario gives you the option to simulate the impact of one plan versus another as if it were being implemented in the real world. This system uses the simulation to provide cost summaries that you can use to compare your budgeted cost against the potential actual costs of a budget plan scenario. As you review these summaries, you can continue to adjust the training demands in your training plan and run additional simulations until you're satisfied that your training cost projections are adequate to meet your training needs.

How the Scenario Process Works

By default, the system compiles all defined general (corporate), departmental and employee training demands into a training demand composite to determine your overall training need. The system then uses this composite to build an initial *BASE* scenario the first time that you use the Adjust Department Demand page. This initial scenario is active by default, and the system loads all of the demands associated with it into a Training Plan.

The Training Plan includes the built scenarios, the simulated demands, the activation of one or several scenarios, and the subsequent freezing of the training plan. There is always a training plan available because it is based on the demands specified in the current active budget plan scenario.



Only one scenario can be the active scenario for each Budget Period and Business Unit, though you may have more than one scenario in your Budget Training system. To activate a scenario, use the Choose Active Scenario Page.

You can adjust your organization's training demands to create a unique demand profile for each scenario. You can do this at the department level and instantly observe the impact of this modification on costs and pricing.

Working With Department and Global Scenarios

You can create new scenarios, either starting from an existing active scenario at the department level or by combining all existing active department scenarios into a single global scenario for your entire enterprise to get the *big picture* view of your training demand, costs, and budget. You can activate or deactivate a scenario, at the Department or Global Scenario level, when you create it.

Using Department Level scenarios works best for large organizations that want to plan their training budgets at the department level in order to capture the level of budgeting detail that they need, to adequately come up with a training budget. You can then roll up the work for all departments to define a training budget for your organization as a whole. More centralized or smaller organizations may find working with Global Scenarios to be more efficient.

You can narrow the scope of the training demands that the system automatically includes in the Training Plan at each Department level or at the Global Scenario level.

Freezing a Scenario to Create a Live Training Plan

You can evaluate your training plan through successive iterations of simulation by Business Unit, creating and activating new scenarios to see how they impact the training plan. Once you decide on the right combination of demand and money, you can freeze the final budget plan scenario to end the evaluation process for a Budget Period and establish your organization's actual training budget.



When you freeze a budget, you freeze the budget for an entire Business Unit.



For more information about freezing budgets, see Freezing Training Budgets and Moving Non Approved Demands.

Understanding How the System Calculates Training Element Costs

This section explains how the system calculates costs that are displayed on the Adjust Department Demand - Demands Page and Adjust Department Demand - Costs Details Page.

When you define an expense associated with a training element, like a vendor, a facility, or an instructor, you specify the cost amount, the cost currency (controlled by the Business Unit that the training element is associated with), and a cost unit type, such as per day or per hour. These costs are stored on the following tables:

- COURSE_TBL
- CRSE_SESS_FACIL
- CRSE_SESS_INSTR
- CRSE_SESSN_COST
- CRSE_SESSN_TBL
- TRN_INSTR_COST

All training element costs are then associated with a course or a catalog element, which specifies the duration, in hours, for a course (stored on the COURSE_TABLE) and the maximum number of students who can enroll in the course.

When you enter a course cost, the system calculates the cost by element for that course and stores them on the Catalog Cost Table and the Course Cost Table so that these amounts are ready to use on the Adjust Department Demand pages. In effect, the system need only multiply the computed costs for the training course by the number of students who need to enroll in the course (the demand) to obtain the final computed cost that it displays when you select a training element on the Cost Details page. When the system calculates the cost, it also converts the cost as recorded on the Course Cost Table or the Catalog Cost Table to the Base Currency specified for this Business Unit on the Budget Period Table (BUDGET_PERIOD_TBL).

To arrive at the cost displayed on the page, the system first determines the course session factor. To understand how the system calculates the costs based on session demand, you need to understand how sessions and cost units impact the Computed Cost calculation.

Using Session Padding to Determine Session Demand

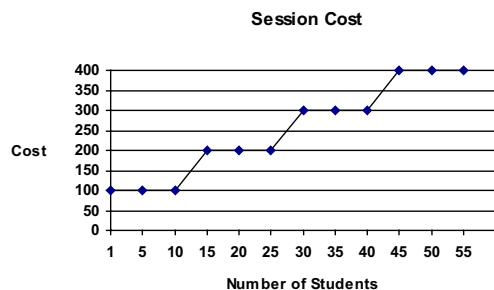
When you define Course and Catalog costs, the system requires you to enter a cost unit for each Per Unit Cost. This cost unit specifies how the cost has to be computed when the system calculates training costs. Cost units can be categorized into four groups:

- Cost for one session, such as Flat Cost.
- Duration-dependent cost, such as Hours.
- Student-dependent cost, such as Student/Training.
- Duration- and student-dependent cost, such as Student/Hours.

While the first two categories, Cost and Duration, aren't student-dependent, in order to have a good cost computation, the number of course sessions that need to be opened to accommodate your estimated training need must be included in the cost formula. Thus, the system needs the number of students by Course (or by Category/Subcategory, when the Demand is defined on a Catalog element) to perform the Adjust Department Demand cost calculation.

However, for budgeting cost purposes, using the exact number of students specified by the demand, to determine the number of course sessions that need to be opened and determine the training cost for this demand, cannot be considered a reliable method because this information is based on a *projection* of what is expected in the future.

The graph below shows the relationship of cost to the expected number of students that need to take a course. If the maximum number of students allowed in a course session is 10, and you plan to train 5 students, and then you find that you need to add 5 more to your Budget Plan, the training cost doesn't change. But if yet another student is added to the demand, the training cost doubles. Based on your current information, that isn't necessarily reliable because it represents a projected number of students per course, and the computed training cost can differ dramatically, based on a minor change in just one variable.

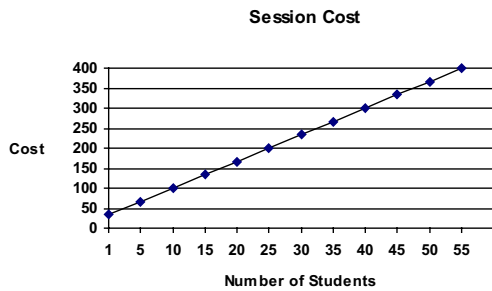


Unweighted session costs based on number of employees in a training demand

To avoid this problem, the system uses the following formula to calculate session padding to determine training demand cost:

$$\text{Number of students planned} / \text{Maximum number of students per course}$$

This cost formula uses a progressive factor to determine the number of required sessions, based on the number of students in the demand, which in turn impacts how the system determines the total session cost.



Adjusted session cost based on number of employees in a training demand



The system applies this session padding factor to calculate costs for all course session dependent cost units—Categories 1 and 2.

How Cost Units Impact Budget Cost Calculations

Once the system has determined the course session demand using session padding, it calculates costs based on the cost unit.

Cost Unit	Cost Computation Detail
None	Not possible; you must always provide a Cost Unit with a Cost Amount.
Km (Kilometers)	These costs are converted directly to the Base Currency.
Flat Cost	Converted to the Base Currency and then multiplied by the session factor.
Hour	Converted to Base Currency, multiplied by the Course Duration, and then multiplied by the Session Factor.
Day	Converted to the Base Currency, multiplied by the Course Duration, divided by 8 (number of hours in a business day), and then multiplied by the Session Factor.
Week	Converted to the Base Currency, multiplied by the Course Duration, divided by 8 (number of hours in a business day), divided by 5 (number of days in a standard work week), and then multiplied by the Session Factor.
Month	Converted to the Base Currency, multiplied by the Course Duration, divided by 8 (number of hours in a business day), divided by 20 (number of working days in a standard work month), and then multiplied by the Session Factor.

Cost Unit	Cost Computation Detail
Year	Converted to the Base Currency, multiplied by the Course Duration, divided by 8 (number of hours in a business day), divided by 20 (number of working days in a standard month), divided by 12 (number of months in a year) and then multiplied by the Session Factor.
Pers/Hr	Converted to the Base Currency, multiplied by the Number of Demands, and multiplied by the course duration.
Pers/Day	Converted to the Base Currency, multiplied by the Number of Demands, multiplied by the course duration, and then divided by 8 (number of hours in a business day).
Pers/Week	Converted to the Base Currency, multiplied by the Number of Demands, multiplied by the course duration and divided by 8 (number of hours in a business day), and then divided by 5 (number of days in a standard work week).
Pers/Month	Converted to the Base Currency, multiplied by the Number of Demands, multiplied by the course duration and divided by 8 (number of hours in a business day), and then divided by 20 (number of working days in a standard work month).
Pers/Year	Converted to the Base Currency, multiplied by the Number of Demands, multiplied by the course duration, then divided by 8 (number of hours in a business day), then divided by 20 (number of working days in a standard work month), and divided by 12 (number of months in a year).
Pers/Train	Converted to the Base Currency, multiplied by the Number of Demands.



All related time conversions are stored in FUNCLIB_HR.COSTUNIT_CONVERTED and FUNCLIB_HR.DURATION_CONVERTED. If you decide to change the number of hours per standard day to 7.4, instead of 8, you need to change only these two functions.



For more information about how the system performs the currency conversion, see Setting Up the Training Cost Currency.

Creating Department Scenarios

The Adjust Department Demand pages enable you to create and work on budget plan scenarios for your organization for a particular budget period. The Adjust Department Demand pages let you work on your training budget scenarios one department at a time. The first time you adjust your department demand, the system will generate a *BASE* scenario based on the demands you set up on the Demand pages. As you adjust demand even further, you will create new scenarios on

the system. This component also enables you to calculate computed costs of training and compare them to the budgeted amount for the scenario.

The Adjust Department Demand pages are the tools you use to determine how many employees the department can afford to train during a specified budget period. The information that you enter on these pages, as you hone your training budget scenarios, is stored in the TRN_SML_COST_TBL.



If you've frozen a scenario for a Budget Period, you cannot modify it on the Adjust Department Demand pages.



For more information about creating departments demands, see Defining Departmental Training Demands.

Adjust Department Demand - Demands Page

Usage	Use the Adjust Department Demand - Demands page to develop a training plan scenario and make adjustments for each of your Demand IDs by department.
Object Name	TRN_ADJ_DEM_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Use, Adjust Department Demand, Demands
Prerequisites	You must set up your demands before you can use this page to create scenarios.
Access Requirements	Enter the Budget Period, Business Unit, and Department.

Demands **Costs Details**

Budget Period: K1999CALYR **Business Unit:** US006 **Department:** KU001 HR

Scenarios View All First 1 of 2 Last

*Scenario: **Active Scenario** Demand Sort: Demand

View All First 1 of 1 Last

Inside Department				All Departments		
Demand ID		Priority	Approved	Demand	Approved	Demand
000002	Effective Interviewing	1	<input type="text" value="5"/>	5	5	5
Total			<input type="button" value="Refresh"/>	5	5	5
Budget / Costs						
Budget Amount:	1570.00	USD	71.08%	Computed Cost:	1115.945	

Adjust Department Demand - Demands page

The system displays the **Budget Period**, **Business Unit**, and **DeptID** (department ID) that you selected. These fields are for information only.

Scenario

The **Scenario** field indicates the scenario on which the simulation is being performed. The system creates an initial **BASE** scenario when you open the Adjust Department Demand - Demands page for the first time.

Insert new scenarios for the department if necessary. The system makes the **Scenario** field unavailable for entry if the Budget Period is frozen. You can add a new scenario only if the Budget Period isn't frozen.

Active Scenario

The system selects the **Active Scenario** check box if this scenario is the active scenario in your Budget Training system.

Only one scenario at a time can be active, per Budget Period and Business Unit, though you can have many different scenarios in your system. Once you've created one or more scenarios on the Adjust Department Demand pages, you can activate a scenario using the Choose Active Scenario Page.

Demand Sort

To change the order in which your demands are listed, select a **Demand Sort** from the available options:

Demand: This sorts demands by **Demand ID**.

Approved: This sorts demands according to the number entered in the **Approved** field.

Priority: This sorts demands by the **Priority** that you specified on the demand pages.

Inside Department

The system builds scenarios using *all* training demands in your PeopleSoft Human Resources system that are associated with the **Business Unit**, the **Budget Period**, and the **Department** that you selected. The system also displays the employee demands that are associated with the selected department.



Employees in one department can be included in many different training demands because demands are generated by Category/Subcategory/Course Code. Similarly, one department can be included in many different training demands.

The system displays the **Demand ID** and a description of the demands. The symbol next to the **Demand ID** indicates the type of demand you are working with:



Indicates an Employee Demand.



Indicates a General (corporate) Demand.

If you need to enter country-specific information, the system links the **Demand ID** to the Department - Country page. Click the Demand ID to view the Department - Country Page, where you enter information that is required by your local country.

Priority

The system displays a numeric value associated with the **Priority** that you assigned to the demand:

1 indicates a high priority demand.

2 indicates a medium priority demand.

3 indicates a low priority demand.

Approved

Enter the number of employees for each demand that you want your training budget to include.

You can approve more employees for training for a Demand ID than are included in the Demand. You need to do this, for example, if you want to add extra budgeting to account for any additional costs due to new employees entering departments or employee transfers.

When you move out of the **Approved** field, the system automatically adjusts any total or summary amounts on the page accordingly.

Demand

The system displays the total demand that you specified for the selected **Demand ID**.

All Departments

Approved

The system displays the number of approved demands for the specified budget period for all departments, not just for the one that you're working with on this page.

Demand

The system displays the total number of demands for the specified budget period for all departments.

Total

The **Total** group box shows a running total of **Approved** demands and the total number of requested demands by department and for all departments.

Refresh

Click the **Refresh** button to update the total demands for the selected department.

Budget/Costs

The **Budget/Costs** group box compares the **Budget Amount** with the **Computed Cost**, based on the selected demands. The system displays the percentage of the **Budget Amount** that your current **Computed Cost** represents.

Budget Amount

The system defaults the budget amount for this budget period from the Department Budget Table Page.

Computed Cost

The system calculates the cost of the training for the department, based on the **Approved** demands.

Department - Country Page

Usage	Use the Department - Country page to enter the country-specific department information that is required for the demand.
Object Name	TRN_DPT_DMD_SEC2

Navigation	To access this page, click the Demand ID on the Adjust Department Demand - Demands page.
------------	--

Department - Country page

France

Use the **France** group box to define how your training demand is split by gender and professional category. Remember that the sum of male and female employees must equal the demand you specified on the Adjust Department - Demands page. Similarly, the sum of all the professional categories must equal the total demand.

Gender

Female Enter the number of female employees who make up the demand shown on the Adjust Department Demand - Demands page.

Male Enter the number of male employees who make up the demand shown on the Adjust Department Demand - Demands page.

Socio Professional Category

Executive Enter the number of employees included in the department demand who are classified as executives.

Manager Enter the number of employees included in the department demand who are classified as managers.

Office Worker Enter the number of employees included in the department demand who are classified as office workers.

Qualified Worker Enter the number of employees included in the department demand who are classified as qualified workers.

Non Qualified Worker Enter the number of employees included in the department demand who are classified as non-qualified workers.

You can print a Training Plan: Distribution report that shows how your training demands are distributed by gender and professional category.

Adjust Department Demand - Costs Details Page

Usage	Use the Adjust Department Demand - Cost Details page to look at the training components costs, such as equipment, vendors, and facilities, that make up your Computed Cost amount in more detail.
Object Name	TRN_SML_COST_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Use, Adjust Department Demand, Costs Details
Prerequisites	You must set up your demands before you can use this page to create scenarios.
Access Requirements	Enter the Budget Period, Business Unit, and Department.

Adjust Department Demand - Costs Details page

The system displays the **Budget Period**, **Business Unit**, and **Department** that you selected. These fields are for information only.

Scenarios

The system displays the **Scenario** that you selected on the Adjust Department Demand - Demands page.

Select a **Cost Source** to view a breakdown of the costs for a particular training element. The valid options are: *Equipment*, *Expense*, *Facility*, *Vendor*, *Instructor*, *Salary Cost*, and *Total Cost*. For example, if you select *Equipment*, the system displays the cost of equipment for each **Demand ID** and compares the total cost of equipment for all demand IDs to the Budget Period Budget Amount and the percentage of the budget that is represented by your equipment costs.

For each **Demand ID**, the system displays the **Approved** demand and the **Computed Cost** for the cost type that is specified in **Cost Source**.

Budget/Costs

In the **Budget/Costs** group box, you can compare your total **Budget Amount** to the **Computed Cost** for each training element or to the Total Cost of all elements.



The total Budget Amount displayed in the **Budget / Costs** group box is the allocated budget amount from the Department Budget Table for this Department and Budget Period only.



For more information about how the system calculates costs, see Understanding How the System Calculates Training Element Costs.

Creating Global Scenarios

For smaller or more centralized organizations, you have the option to define your training plan using global (or organization-wide) scenarios, rather than by one department at a time. When you create global scenarios, you can limit their scope by defining special criteria that tell the system what each global scenario should include. For example, you could limit the Global Scenario scope by excluding certain demands. Alternatively you could increase the demands included in the new scenario by multiplying the approved headcount in existing demands by a factor that you specify.



Global Scenarios are specific to Budget Periods and Business Units, but they include *all departments* within the Business Unit that you specify when you create the Global Scenario.

You have two options for creating global scenarios:

- **Building global scenarios using criteria.** If you're setting up a global scenario, and you want to use selection criteria to define the global scenario's attributes, you can use the Create Scenario by Criteria Process.
- **Copying existing scenarios.** If you've already created at least one global scenario, then you

can clone it as many times as you need to for different Budget Periods and Business Units, using the Create Global Scenario Process.



For more information about running processes in PeopleSoft HRMS, see Process Scheduler.

Creating Global Scenario by Criteria

Use the Create Scenario by Criteria component to create a global scenario using selection criteria to specify the global scenario's attributes. There are two pages in the component:

Create Scenario by Criteria - Criteria 1 Page is where you define the departments, job codes, and competencies ratings to include or exclude.

Create Scenario by Criteria - Criteria 2 Page is where you define the courses to include or exclude from the scenario.

Create Scenario by Criteria - Criteria 1 Page

Usage	Use the Criteria 1 page to include or exclude departments, job codes, and competencies for a particular Budget Period and Business Unit in the global scenario.
Object Name	RUNCTL_TRN008_1
Navigation	Develop Workforce, Budget Training (GBL), Process, Create Scenario By Criteria, Criteria 1
Prerequisites	You must set up your training demands before you can use this page.
Access Requirements	Enter a Run Control ID.

Create Scenario by Criteria - Criteria 1 page (1 of 2)

Create Scenario by Criteria - Criteria 1 page (2 of 2)

Select a **Budget Period** and a **Business Unit** that you want to associate with the new global scenario. Enter the name of your **New Scenario**. Scenario IDs can be up to 10 characters long. Select the **Active New Scenario** check box to make the new global scenario the current active scenario in your system when you run the process.



Only one scenario can be the active scenario for each Budget Period and Business Unit, though you may have more than one scenario in your Budget Training system.

Or

When you open the page, the system automatically specifies that your first selection statement is **Criteria # 1**. You can enter multiple inclusion or exclusion statements. The system processes the statements in order based on their **Criteria #** (criteria number). The **Criteria #** order can seriously impact the result of your Create Scenario by Criteria process, so consider how you organize your statements carefully.

If you want to reorganize a series of statements, update the **Criteria #** fields and save the page. When you reopen the page, the system displays the statements in the appropriate order.

Select the **Link with Competencies** check box if you want to include competencies as part of your criteria statement. When you select this check box, the system makes the **Competency** fields available for entry. Select the **Competency**, and select a competency rating **Level**. You define the competency codes on the Competency Table and the associated rating levels on the Rating Model Table. When you complete the Competency fields, the system includes or excludes workers with competencies at the rating that you specified.

Enter a new **Criteria #** to define additional profile criteria statements.

Include

In the **Include** group box, select the **Department**, **Job Code**, and **Competency** that you want to include in the scenario. To include both the Department that you specify and all child departments to that Department on the Department Tree, you can use one of the following buttons:



Click the **Expand** button to automatically add related departments specified in the Department Tree to the list on this page. This enables you to add several departments to the list in one step.



Click the **Collapse** button to delete related departments from the list. The system deletes only the departments that you added using the **Expand** button. Departments that you added manually remain on the list, even if they are related departments.



For more information about entering departments on this page automatically, using the Department Tree feature in Budgeting Training, see *Using the Department Tree to Populate Departments*.

Exclude

In the **Exclude** group box, select the **Department**, **Job Code**, and **Competency** that you want to exclude from the scenario. Use the **Expand** and **Collapse** buttons to add or remove departments on your department tree.



You can select only departments that are associated with the Business Unit that you associated with the new Global Scenario in the **Business Unit** field.



For more information about how Business Units impact field prompt values on pages in PeopleSoft HRMS, see *Regulating HRMS System Data*. For more information about setting up and tracking employee competencies, see *Managing Competencies*.

Understanding How the Criteria Statements Include or Exclude Employees From the Demand

In the following example, the selection includes employees in department **KC001** who are assigned to Job Code **KC012**, HR Analyst.

Including criteria statement

In the same selection criteria statement, you might want to exclude any employees with a high rating (**Level 5**) in the **Competency 0703**, Negotiation, as follows:

Excluding criteria statement



You can opt *not* to enter a Department, Job Code, or Competency in any criteria statement. For example, if you didn't specify a Job Code in the Exclude criteria statement, the system would exclude any employees in Department 10600 with an Expert proficiency Level rating in Competency 0155.

Create Scenario by Criteria - Criteria 2 Page

Usage	Use the Criteria 2 page to write criteria that specifies which courses should be included in the scenario.
Object Name	RUNCTL_TRN008_2
Navigation	Develop Workforce, Budget Training (GBL), Process, Create Scenario By Criteria, Criteria 2
Prerequisites	You must complete the Criteria 1 page before you use this page.
Access Requirements	Enter a Run Control ID.

Create Scenario by Criteria - Criteria 2 Page

For each demand selection statement (**Criteria #**) that you defined on the Criteria 1 page, enter the courses to include or exclude from the global scenario.

Include

Use the **Include** group box to specify the courses that you want to include in the global scenario. Select the **Category**, **Subcategory** (subcategory), and **Course Code**. When you select a course code, you can select only courses that are associated with the category and subcategory that you select.

Select the **Not in Catalog** check box if the course isn't on the Catalog Table. To calculate costs for the courses that are not in your catalog, the costs for the course, such as vendor, instructor, and facility costs, need to be stored on the Course Cost Table.

For example, if you include the **Category Computers**, the **Subcat OPER SYS** (operating systems), and the **Course Code 4002, DOS/Windows Operating System**, the global scenario will include all the demands that you have for that course.

Exclude

Use the **Exclude** group box to specify courses that you want to exclude from the global scenario. Select the **Category**, **Subcat**, and **Course Code**.

Select the **Not in Catalog** check box if the course isn't on the Catalog Table.

Click **Run** to run this request. Process Scheduler runs the Create Scenario by Criteria process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

Create Global Scenario Page

Usage	Use the Create Global Scenario page to create a scenario by copying a global or an active scenario that you previously created for another Budget Period or Business Unit.
Object Name	RUNCTL_TRN007
Navigation	Develop Workforce, Budget Training (GBL), Process, Create Global Scenario, Create Global Scenario
Prerequisites	You must have an existing global scenario before you can use this page.
Access Requirements	Enter a Run Control ID.

Create Global Scenario page

Select the **Budget Period** and **Business Unit** that you want your new scenario to be associated with.

Enter a **New Scenario** ID for the scenario you want to create.

In the **Scenario Type** group box, select the existing scenario that you want to copy. If you select **Active**, the system uses the current active scenario for the specified **Business Unit** as the source for the new scenario. If you select **Global**, then select one of the other global scenarios that you've already defined as the source for your new scenario.

Select the **Active New Scenario** check box if you want the new global scenario you are creating to be the active scenario. Remember, you can have only one active scenario for a given budget period.



Remember that if the Budget Period you specified is frozen, then you cannot make the global scenario you're defining here the active scenario. If you attempt to do so, the system issues a warning message when you save the page.

General Demand

In the **General Demand** group box, enter a multiplier for the **Increase Approved by Factor**.

- To reduce the total number of approved General Demands, enter a value of less than **1**.
- To increase the total number of approved General Demands, enter a value of more than **1**.
- To keep the total number of approved General Demands as they are in the source scenario, enter **1**.

For example, if you enter **.75** here, and your source scenario specifies 100 approved demands, then the new global scenario will have 75 approved demands when the build process is done. If you wanted to double your approved demands, you would enter an **Increase Approved by Factor** of **2**. The result would be 200 approved demands in your new scenario.

Individual Demands

Use the **Individual Demand** group box to specify which employee demands you want to include in your new global scenario.



You establish Demand Priority for employees by using the Employee Demand page and the Employee Demand by Course page.

Select **All Demands** to copy existing employee demands.

Select **Approve** to copy approved demands to the new scenario. Select a priority in the **higher than priority** field to copy approved demands that are higher than the selected priority. For example, if you selected **Low** in the **higher than priority** field, the system would include all **Medium** and **High** priority demands.

Select **Unapprove** to copy employee demands that are unapproved. Unapproved demands are demands that have an approved headcount of 0, even though there is a requested demand headcount for the Demand ID. Select a priority in the **less than priority** field to copy unapproved demands that are lower than the selected priority.

Click **Run** to run this request. Process Scheduler runs the Create Global Scenario process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

Making a Scenario Active

To make a scenario active, use one of these pages:

- To make a department scenario active, use the Choose Active Scenario Page.
- To make a global scenario active, use the Scenario List Page.

Choose Active Scenario Page

Usage	Use the Choose Active Scenario page to select a scenario to activate. You can work only with the active scenario on the Adjust Department Demand pages.
Object Name	TRN_ADJ_SCE_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Use, Choose Active Scenario, Choose Active Scenario
Prerequisites	Before you can use this page, you must create department scenarios.
Access Requirements	Enter the Budget Period, Business Unit and Department.

Choose Active Scenario

Budget Period: K1999CALYR **Business Unit:** CAN01 **Department:** KC001 HR

Scenario	Approved	Ratio	Computed Cost	Active Scenario
BASE	0	0.00%	0.000	<input type="checkbox"/> Active Scenario
GBLCAN1	0	0.00%	0.000	<input type="checkbox"/> Active Scenario
KGBCAN2	0	0.00%	0.000	<input checked="" type="checkbox"/> Active Scenario
KGBCAN3	0	0.00%	0.000	<input type="checkbox"/> Active Scenario

Budget Amount 2170.00 CAD Refresh

Choose Active Scenario page

The system displays the **Budget Period**, **Business Unit**, and **Department** that you selected. These fields are for information only.

The system displays the following information for each **Scenario** that is associated with the selected **Department**: the number of **Approved** employee demands, the corresponding **Computed Cost**, and the **Ratio** of the total Computed Cost for the scenario to the department **Budget Amount**.

To make one of the scenarios displayed the active scenario, select the **Active Scenario** check box and save the page.



Only one scenario can be active for a given Budget Period and Business Unit, though you can work with many different budget scenarios in your Budget Training module. You cannot change the status of a scenario that is part of a frozen budget.

Scenario List Page

Usage	Use the Scenario List page to make a global scenario your active scenario for a Budget Period and Business Unit.
Object Name	TRN_LST_SCE_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Inquire, Set Global Scenario Active, Scenario List
Prerequisites	Establish Global Scenario.
Access Requirements	Enter the Budget Period and Business Unit.

Scenario List

Budget Period: K1999CALYR **Business Unit:** CAN01 **Base Currency:** CAD

View All First ◀ 1-3 of 3 ▶ Last

Scenario	Approved	Cost	Active Scenario
GBLCAN1	30	4958.76	<input type="checkbox"/> Active Scenario
KGBLCAN2	35	4659.65	<input checked="" type="checkbox"/> Active Scenario
KGBLCAN3	29	3728.07	<input type="checkbox"/> Active Scenario

Current Active Scenario

	35	4659.65
--	----	---------

Scenario List page

The system displays the **Budget Period** and **Business Unit** that you selected and the **Base Currency** for the costs.

The system displays the following information for each **Scenario** that is associated with the selected **Business Unit**: the number of **Approved** demands and the corresponding **Cost**.

To make one of the scenarios displayed the active scenario, select the **Active Scenario** check box and save the page.



Only one scenario can be the active scenario for each Budget Period and Business Unit, though you may have more than one scenario in your Budget Training system. You cannot change the status of a scenario that is part of a frozen budget.

Viewing Approved Demands

There are two ways to view approved demands:

Approved in Active Scenario enables you to view the approved demands for the current active scenario.

Approved in Global Scenario enables you to view approved demands for a global scenario.

Approved in Active Scenario - Approved by Demands Page

Usage	Use the Approved in Active Scenario - Approved by Demands page to view the approved demands for the active scenario.
Object Name	TRN_ADJ_DEP_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Inquire, Approved in Active Scenario, Approved by Demands
Prerequisites	Before you can use this page, you must create department demands.
Access Requirements	Enter the Budget Period, Business Unit, and Demand ID.

Approved by Demands

Budget Period: K1999CALYR **Business Unit:** CAN01 **Demand ID:** 000010 Gndr Comm

Total General Demand: 8 **Sort By:**

Department	Approved	Demand
KC006 Training & Administration	19	8
Total	19	8

[View All](#) [First](#) 1 of 1 [Last](#)

Approved in Active Scenario - Approved by Demands page

The system displays the **Budget Period**, the **Business Unit**, and the **Demand ID** for your reference for the active scenario. The symbol next to the demand ID indicates the type of demand:



Indicates an Employee Demand



Indicates a General Demand (for your entire organization)

Sort by

To change the order in which the information is listed, select one of these options in the **Sort by** field:

Demand: This sorts demands by the number of requested demands

Approved: This sorts demands according to the number entered in the Approved field.

The page lists the demands for each **Department** included in the active training budget scenario Department.

Approved in Global Scenario - Approved by Demands Page

Usage	Use the Approved in Global Scenario - Approved by Demands page to view the approved demands in a global scenario.
Object Name	TRN_ADJ_DEPG_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Inquire, Approved in Global Scenario, Approved by Demands
Prerequisites	Before you can use this page, you must create department demands and global scenarios.
Access Requirements	Enter the Budget Period, Business Unit, Scenario ID, and Demand ID.

Approved by Demands			
Budget Period:	K1999CALYR	Business Unit:	CAN01
Scenario:	GBLCAN1	Demand ID: 	000012 Griffiths, Martina Rae
Total General Demand:	1	Sort By:	Approved
View All First 1 of 1 Last			
Department		Approved	Demand
KC001	Human Resources	1	1
Total		1	1

Approved in Global Scenario - Approved by Demands page

The system displays the **Budget Period**, the **Business Unit**, the global **Scenario** name, and the **Demand ID** for the active scenario. The symbol next to the **Demand ID** indicates the type of demand:



Indicates an Employee Demand.



Indicates a General Demand (for your entire organization).



For more information about how to define General and Employee Demands in the Budget Training module, see Defining Training Requirements.

Sort by

To change the order in which the information is listed, select one of these options in the **Sort by** field:

Demand: This sorts demands by the number of requested demands.

Approved: This sorts demands according to the number entered in the Approved field.

The page lists the demands for each **Department** included in the scenario.

Viewing Active Scenario Summaries

Once you've set up your training budget scenarios, you have several options for reviewing them online using Inquire pages. While you cannot work with the scenarios using these pages, you can get a quick look at them from different points of view.

Use the Active Scenario Summary inquiry to review the total costs and the demands included in the active scenario for all departments that are represented in your organization's training demands. Because these pages provide you with details on all of your departments by department in one place, this is an excellent tool for evaluating your overall training budget for the active budget scenario.



For more information about making one of your training scenarios active, see Making a Scenario Active.

Active Scenario Summary - Total Costs Page

Usage	Use the Active Scenario Summary - Total Costs page to view your cost details and the total cost of the current active scenario.
Object Name	TRN_SML_DEP_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Inquire, Active Scenario Summary, Total Costs
Prerequisites	Establish a budget scenario.
Access Requirements	Enter the Budget Period and Business Unit.

Department		Approved	Budget	Ratio	Computed Cost
KU005	Finance	11	USD7200.00	88.09 %	USD6342.49
Budget / Costs		11	USD7200.00	88.09 %	USD6342.49

Active Scenario Summary - Total Costs page

This page displays the cost detail for the active scenario sorted by **Department**. For each **Department**, the system displays the Department ID and description and (in the **Approved** field) the number of employees that you approved for training on the Adjust Department Demand - Demands Page.


The system populates the department **Budget Amount** from the Department Budget Table and the current **Computed Cost** from the Adjust Department Demand - Costs Details Page. The **Ratio** field shows the percentage of the department **Budget** amount to the current **Computed Cost** for the approved Demands. You can quickly determine whether one department is out of sync with the others by being either over or under budget. You can also quickly determine which departments are on budget.

Budget/Costs

The **Budget/Cost** group box gives you a total of the **Approved** employee Demands for all departments included in the active scenario. The system displays your total training **Budget** for all departments and your current total **Computed Cost**. The **Ratio** indicates whether your current computed costs are over or under budget.

Active Scenario Summary - Demands Page

Usage	Use the Active Scenario Summary - Demands page to view summary information about the demands associated with the active scenario.
Object Name	TRN_SML_DEM_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Inquire, Active Scenario Summary, Demands
Prerequisites	Establish scenario demands.
Access Requirements	Enter the Budget Period and Business Unit.

Total Costs		Demands	
Budget Period:	K1999CALYR	Business Unit:	GBIBU
		Base Currency:	USD
		View All First 1 of 1 Last	
Demand ID		Approved	Demand
 000008	Time Management	11	10
Total		11	10

Active Scenario Summary - Demands page

For the current active scenario, the system lists each **Demand ID** for the specified **Budget Period** and **Business Unit**. For each demand, the **Approved** field shows the number of employees that you've approved for training on the Adjust Department Demand - Demands Page.



You can obtain a printed report of this information by running the Active Scenario Summary report.

Viewing Global Scenario Summaries

Once you've set up your training budget scenarios, you have several options for reviewing them online using Inquire pages. While you cannot work with the scenarios using these pages, you can get a quick look at them from different points of view.

Use the Global Scenario Summary pages to review the total costs and the demands in a global scenario. Because these pages provide you with details on all of your departments, by department, in one place, this is an excellent tool for evaluating your overall training budget for the active budget scenario.

Global Scenario Summary - Total Costs Page

Usage	Use the Global Scenario Summary - Total Costs page to view your cost details and the total cost of a selected scenario.
Object Name	TRN_SML_DEPG_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Inquire, Global Scenario Summary, Total Costs

Prerequisites	Before you can use this page, you must create a global scenario.
Access Requirements	Enter the Budget Period, Business Unit, and Scenario ID.

Total Costs		Demands		
Budget Period:	K1999CALYR	Business Unit:	GBIBU	
Scenario:	KGBLGBIBU1	Base Currency:	USD	
View All First 1 of 1 Last				
Department	Approved	Budget	Ratio	Computed Cost
KU005 Finance	11	7200.00	88.09 %	6342.49
Budget / Costs				
	11	7200.00	88.09 %	6342.49

Global Scenario Summary - Total Costs page

For your reference, the system displays the global scenario’s **Budget Period, Business Unit, Scenario ID, and Base Currency.**

You specify the default currency for Business Units for a Budget Period on the Budget Period Table. Budgets for your organization are automatically converted to the default base currency for your organization that you establish on the Training Base Currency Table (TRN_BASE_CURRENCY).



For more information about base currency and how it works in budget training, see Overview of Training Currencies.

The page displays the cost detail for the scenario, sorted by **Department**. For each **Department**, the system displays the Department ID and description and (in the **Approved** field) the number of employees that you approved for training on the Adjust Department Demand - Demands Page.


The system populates the department **Budget** amount from the Department Budget Table and the current **Computed Cost** from the Adjust Department Demand - Costs Details Page. The **Ratio** field shows the percentage of the department **Budget** amount to the current Computed Cost for the approved Demands. You can quickly determine if one department is out of sync with the others by either being over or under budget. You can also quickly determine which departments are on budget.

Budget/Costs

The **Budget/Cost** group box gives you a total of the **Approved** employee Demands for all of your departments included in the active scenario. The system displays your total training **Budget** for all departments, your current total **Computed Cost**. The **Ratio** indicates whether your current computed costs are over or under budget.

Global Scenario Summary - Demands Page

Usage	Use the Global Scenario Summary - Demands page to view summary information for the demands that are associated with the selected scenario.
Object Name	TRN_SML_DEMG_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Inquire, Global Scenario Summary, Demands
Prerequisites	Before you can use this page, you must create a global scenario.
Access Requirements	Enter the Budget Period, Business Unit, and Scenario ID.

Total Costs		Demands	
Budget Period:	K1999CALYR	Business Unit:	GBIBU
Scenario:	KGBLGBIBU1	Base Currency:	USD
		View All First 1 of 1 Last	
Demand ID		Approved	Demand
 000008	Time Management	11	10
Total		11	10

Global Scenario Summary - Demands page

For your reference, the system displays the global scenario's **Budget Period, Business Unit, Scenario ID, and Base Currency.**



For more information about base currency and how it works in budget training, see Overview of Training Currencies.

For the current active scenario, the system lists each **Demand ID** for the specified **Budget Period, Business Unit, and Scenario**. For each demand, the **Approved** field shows the number of employees that you approved for training on the Adjust Department Demand - Demands Page.



You can obtain a printed report of this information by running the Global Scenario Summary report.

Tracking Your Training Plan

Your company training plan for a course can undergo constant cost reviews and updates until you freeze the company training plan. You can create department views to help you view your training plan. For example, by creating a department view that corresponds to a business unit, you can view the aggregate training plan for all the departments in the business unit.

You can create department views using the Departmental View page, and use the Training Plan - Course List Page to view the training plan for a selected department view.

Departmental View Page

Usage	Use the Departmental View page to define specific departmental groups. You can use these views to display all or part of your training plan and compare your actual and budget costs. You can create numerous views that correspond to different functional or geographic requirements in your organization. These groupings of departments form snapshot views, which you can think of as segments of the organization that you've grouped together so that you can perform comparative costs analysis.
Object Name	TRN_DSPL_TARGET
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Departmental View, Departmental View • Develop Workforce, Administer Training (USF), Setup, Departmental Plan, Departmental View • Develop Workforce, Budget Training (GBL), Setup, Departmental View, Departmental View
Prerequisites	Establish a Business Unit and a Department View ID.
Access Requirements	Enter the Business Unit and Department View ID.

Departmental View

Business Unit: CAN01 GBI BU for Canada **Dept View ID:** KCHR

Description:

Short Description:

Department	Tree	
<input type="text" value="KC001"/> <input type="button" value="Q"/>	Human Resources	+ - + -
<input type="text" value="KC002"/> <input type="button" value="Q"/>	Benefits	+ - + -
<input type="text" value="KC003"/> <input type="button" value="Q"/>	Information Services	+ - + -
<input type="text" value="KC005"/> <input type="button" value="Q"/>	Finance	+ - + -
<input type="text" value="KC006"/> <input type="button" value="Q"/>	Training & Administration	+ - + -
<input type="text" value="KC015"/> <input type="button" value="Q"/>	Sales and Services	+ - + -

Departmental View page

Enter a **Description** and the **Short Description**.

In the **Department** field, enter the list of departments that you want to be included in your view. The **Tree** field gives you various options and some information about the department.



For more information about entering Departments in this page automatically, using the Department Tree feature in Budgeting Training, see Using the Department Tree to Populate Departments.

Training Plan - Course List Page

Usage	Use the Training Plan - Course List page to view your training plans by Departmental View.
Object Name	TRN_PLAN_APR_TABLE
Navigation	Develop Workforce, Budget Training (GBL), Inquire, Training Plan, Course List
Prerequisites	Before you can use this page, you must create department views on the Departmental View page.
Access Requirements	Enter the Budget Period and Business Unit.

Course List				
Budget Period:	K1999CALYR	Business Unit:	CAN01	ID: KCHR
				Base Currency: CAD
Course Code		Cost	Approved	Duration
K003	Performance Management	401.01	2	16.0 Hours
K004	Gender Communication	604.15	19	19.0 Hours
K005	Professional Presentations	1452.99	7	168.0 Hours
K013	PeopleSoft HRMS	2201.51	7	112.0 Hours
Total		4659.65	35	315.0 Hours

Training Plan - Course List page

The system displays the following for each **Course Code** in your training plan: the computed **Cost**, the total number of people **Approved** for each course, and the total training **Duration** that it represents in hours.

Total

The **Total** group box shows the total cost, the total approved demands, and the total number of hours of training for all courses listed.

Freezing Training Budgets and Moving Non Approved Demands

Once you’ve completed the creation, review, and adjustment of your training scenarios, you can freeze your company training budget for a specified budget period and business unit. Once you freeze a budget, you can no longer update or change any demands or scenarios associated with the budget period and business unit. Use the Freeze Budget Period Page to freeze a budget period.

Once you’ve frozen a budget for a Business Unit and Budget Period, you can move any demands from the frozen budget period that you didn’t approve to the next budget period for consideration there. Use the Move Non Approved Demands Page to move demands between budget periods.

You can set the system so that it automatically includes employees who didn’t get approval for their training request in one budget period as part of the demand for the next budget period.

Freeze Budget Period Page

Usage	Use the Freeze Budget Period page to freeze or unfreeze a budget period.
-------	--

Object Name	TRN_FREEZE_PERIOD
Navigation	Develop Workforce, Budget Training (GBL), Use, Freeze Budget Period, Freeze Budget Period
Prerequisites	None
Access Requirements	Enter the Budget Period and Business Unit.

Freeze Budget Period

Budget Period: K1999CALYR 1999 Training Budget Period **Frozen**

Business Unit: US004 GBI BU for US004

From Date: 01/01/1999 **Thru Date:** 31/12/1999 **Base Currency:** USD

Budget / Costs

Approved	Budget	Ratio	Computed Cost	Refresh
0	0.00 <input type="text"/>	-- %	0.00 <input type="text"/>	

Freeze Budget Period page

This page displays all of the **Approved** demands, the total **Budget** that is the sum of all of the individual department budgets included in the plan, the total **Computed Cost** for all departments in the training plan, and the **Budget/Cost Ratio** for the entire training plan.

To freeze the plan, select the **Frozen** check box and save the page.



Freezing a training plan turns it into a *live* training budget for the Business Unit for the specified Budget Period.



To unfreeze a training period, clear the **Frozen** check box and save the page.

Move Non Approved Demands Page

Usage	<p>Use the Move Non Approved Demands page to move unapproved demands to the next budget period, once the current budget period has been frozen.</p> <p>Any demand with an Approved field value of 0 is considered unapproved by the system. Also, if you have a Demand ID with a requested Demand of 16, but you approved only 12 of the requested 16 headcount for the demand, the system considers the unapproved demands for the Demand ID to be 4, because you didn't approve 4 of</p>
-------	--

	the requested demand headcount. The Move Non Approved Demands Process carries forward the 4 unapproved demands for the Demand ID..
Object Name	RUNCTL_TRN015
Navigation	Develop Workforce, Budget Training (GBL), Process, Move non Approved Demands, Move Non Approved Demands
Prerequisites	None.
Access Requirements	Enter a Run Control ID.

Move Non Approved Demands

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Language: English

Budget Period: K1999CALYR 1999 Training Budget Period

Business Unit: US004 GBI BU for US004

Target Budget Period: K2000CALYR 2000 Training Budget Period

Data Override

Move Non Approved Demands page

Select the source **Budget Period** and **Business Unit** that you want to move the unapproved demands from. Then select the **Target Budget Period** that you want to move the demands to.

We recommend that you apply this process to unapproved budgets before you create any new demands for the target budget period.

Select the **Data Override** check box if you have run the Move Non Approved Demands process already, and you want the system to override the results from the previous process run with the new results.



Important! If you clear the Data Override check box, and you're running the process for the first time, there's no danger that the system will override any manual changes that you've made to the process results. If you rerun the process later, with the **Data Override** check box selected, then any changes that you made for unapproved demands on the source Budget Period will be reflected in the target Budget Period when you run the process. If the check box is cleared, you'll lose any changes that you may have made.

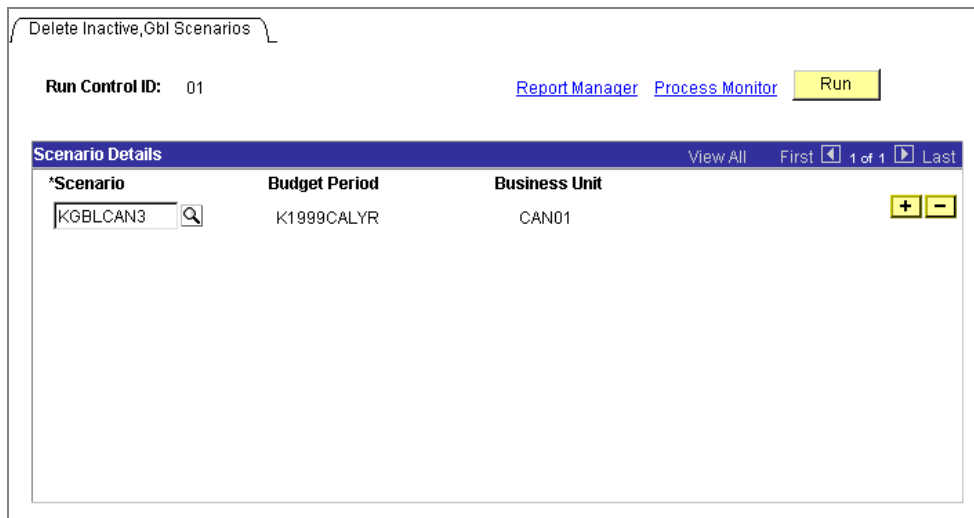
Deleting Obsolete Global Scenarios

As you develop different global scenarios for your organization, you will need to delete obsolete scenarios for budget periods that are frozen. Use the Delete Inactive, Gbl Scenarios (delete

inactive, global scenarios) page to initiate the process to delete the global scenarios that you no longer need.

Delete Inactive, Gbl Scenarios Page

Usage	Use the Delete Inactive, Gbl Scenarios page to delete redundant global scenarios. You can delete global scenarios only if the scenarios status is Inactive and the budget period for the associated business unit is frozen. When you run this process, the system deletes data from these tables: TRN_SIMULATION and TRN_SCENARIO.
Object Name	RUNCTL_TRN031
Navigation	Develop Workforce, Budget Training (GBL), Process, Delete Inactive,Gbl Scenarios, Delete Inactive,Gbl Scenarios
Prerequisites	None.
Access Requirements	Enter a Run Control ID.



Delete Inactive,Gbl Scenarios page

The system displays your **User ID** and the **Run Control ID** you selected. These fields are for information only.

Scenario Details

Scenario

Select the scenario that you want to delete, from the list of scenarios. The system lists only the scenarios that are inactive and refer to a budget period that is frozen. When you move out of this field, the system populates the **Budget Period** and **Business Unit** fields.

Add a row for each scenario that you want to delete.

Budget Period

The system displays the budget period that you associated with the **Scenario**. You specify the **Budget Period** when you create the scenario, using the Create Scenario by Criteria process or the Create Global Scenario process.

Business Unit

The system displays the **Business Unit** that you associated with the scenario when you created it.

Click **Run** to run this request. Process Scheduler runs the Delete Obsolete Global Scenarios process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

CHAPTER 6

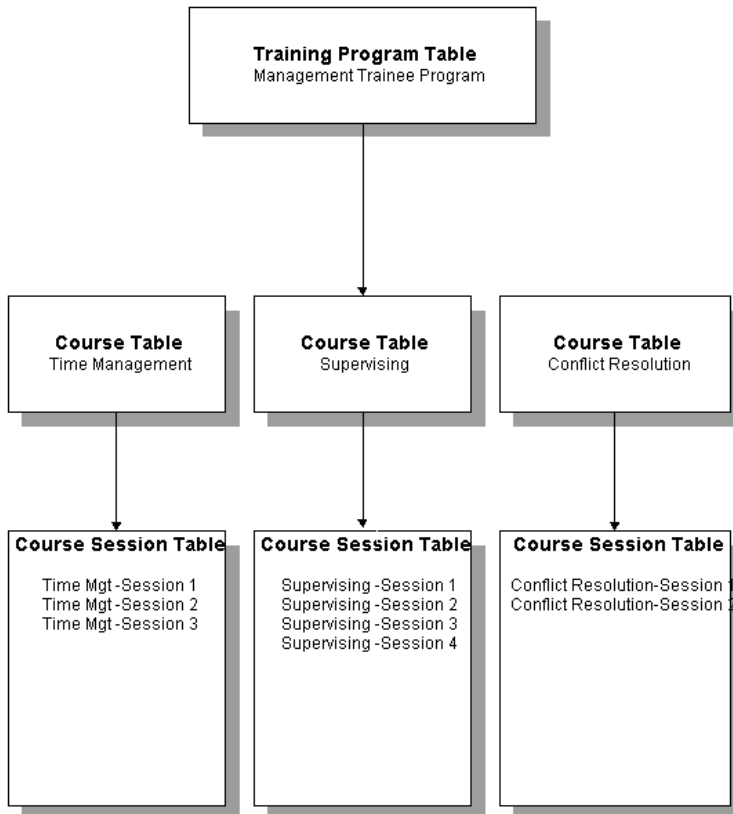
Administering Course Sessions

PeopleSoft Human Resources makes it easy for you to track all the details that you need to get courses up and running. Once sessions are set up, you can enroll students in a matter of minutes. And to help you keep up with all the changes that inevitably occur, PeopleSoft provides you with a variety of ways to review and update student status and session enrollment data.

This section explains how to schedule course sessions, track course session costs, and how to record student feedback about your course sessions.

Overview of Course Session Administration

The following diagram illustrates where setting up course sessions falls in your Training Administration hierarchy in the Administer Training Business Process:



Establishing course sessions

As you can see, before you set up course sessions, you need to have defined courses and training programs for your organization.



For more information about setting up courses and training programs, see *Defining Training Courses and Programs*.

Setting Up Course Sessions

Use the Course Session Table to set up sessions for the courses that you administer in-house. This table is where you enter specific information about sessions, including the dates, times, location, and cost. You can also track information such as available equipment, instructor, and any services that you outsource to vendors.

Cut Sessions

Cut sessions are a means of dividing a course session. Each cut session has its own start date, end date, location, and instructor. Use cut sessions for course sessions that:

- Don't run consecutively from start to finish. For example, you might have a course that runs 2 days a week for a month.
- Are held in different training rooms or facilities. For example, if you have a 2 week course, with the first week in room 2 and the second week in room 3.
- Are taught by multiple instructors. Using cut sessions ensures that the instructors are available during any periods they aren't teaching.

Cut Session Examples

Example 1

Course Dates: Monday and Tuesday for 4 weeks (starting 1 May, finishing 23 May)

Location: Company HQ, Conference Room 4

Instructor: Mr. Campbell

Set this up in Administer Training, as follows:

Course Session. You set up the Course Session on the Course Session Table - Course Session Profile Page with these details:

Start Date	End Date	Duration
1 May	23 May	4 days

Cut Sessions. You then set up four cut sessions by creating four rows on the Location, Instructor page with these details:

Start Date (Monday)	End Date (Tuesday)	Duration	Location	Instructor
1 May	2 May	2 days	Company HQ, Conference Room 4	Mr. Campbell
8 May	9 May	2 days	Company HQ, Conference Room 4	Mr. Campbell
15 May	16 May	2 days	Company HQ, Conference Room 4	Mr. Campbell
22 May	23 May	2 days	Company HQ, Conference Room 4	Mr. Campbell

Example 2

Course Dates: 1 May thru 5 May

Locations: Company HQ, Conference Room 4 for first 2 days and Conference Room 1 for final 3 days

Instructor: Mr. Campbell

Set this up in Administer Training, as follows:

Course Session. You set up the Course Session on the Course Session Table - Course Session Profile Page with these details:

Start Date (Monday)	End Date (Friday)	Duration
1 May	5 May	5 days

Cut Sessions. You then set up two cut sessions by creating two rows on the Location, Instructor page with these details:

Start Date	End Date	Duration	Location	Instructor
1 May	2 May	2 days	Company HQ, Conference Room 4	Mr. Campbell
3 May	5 May	3 days	Company HQ, Conference Room 2	Mr. Campbell

Planning and Setting Up Course Sessions

To help you schedule course sessions, the Administer Training menu includes a Course Session Planner. From the Course Session Planner Page, you can check the availability of training rooms and instructors for any given dates before you set up the course session on the Course Session Table.

The Course Session Table consists of four pages:

Use the Course Session Profile page to enter session dates, times, and minimum and maximum students allowed in the session.

Use the Location, Instructor page to enter training location information and instructor. If you need to divide the session into cut sessions, you need to select a training facility and instructor for each cut session.

Use the Equipment page to identify the equipment required for the training session

Use the Expenses page to enter the types of expenses associated with the session.

Once you have set up course sessions, you can use the Course Session Summary Page to view details of the session and see a list of students enrolled in the session or on the session waiting list.

Course Session Planner Page

Usage	Use the Course Session Planner page to plan a new course session. From this page you can check the availability of training rooms and instructors. When you are ready to set up a course session, click Course Session Setup. The system displays the Course Session Table and transfers the information that you have entered on this page.
Object Name	CRS_SESS_PLAN1
Navigation	Develop Workforce, Administer Training (GBL), Setup, Course Session Planner, Course Session Planner
Prerequisites	You must have set up the course on the Course Table.
Access Requirements	Enter a Course Code.

Course Session Planner

Course Code: K001 Time Management Duration: 2.0 Day

Start/End Dates: 08/11/2000 09/11/2000 Start/End Times: [Course Session Setup](#)

Facility: KCFAC1 Cdn HQ Room Code:

Training Room Booked Time					
Facility	Room Number	Start Date	End Date	Start Time	End Time
KCFAC1	ROOM1	08/11/2000	09/11/2000	09:00	18:00

Language: EN English

Instructor:

Instructor Booked Time					
Instructor	Name	Start Date	End Date	Start Time	End Time
KC0015	Campbell,Barry Robert	08/11/2000	09/11/2000	09:00	18:00

Course Session Planner page

Start/End Dates

Enter the period start and end dates in the **Start/End Dates** fields. When you move out of these fields, the system updates the instructor grid with a list of qualified instructors who are booked during the specified period. If you have specified a **Facility**, the system also updates the facility grid with existing bookings.

You can make this period as long as you want and then adjust the dates as you narrow your search for free instructors and training rooms. However, the system doesn't system check availability of **Instructor** or **Facility** until you select a start date. Before you can set up the course session, you must complete both dates, as they become the course session start and end dates when you click the **Course Session Setup** link.

Start/End Times

The system displays the **Start/End Times** fields when you complete the end date and move out of the field. Enter the **Start/End Times** for the course session.

Course Session Setup

Click **Course Session Setup** when you find an instructor or training room available for the dates you specified, and you are ready to set up the course session. The **Instructor** and **Facility** aren't mandatory fields, so you can set up a course session with just one of these fields completed. For example, if the course session will be held at a vendor site that is not included in your Training Facility Table, you can still use the Course Session Planner to check instructor availability.

The system makes **Course Session Setup** unavailable if you haven't selected an end date, or if you have selected an instructor or a training room that is booked during the period defined by **Start/End Dates**.

When you click **Course Session Setup**, the system transfers you to the Course Session Table and copies over the data from the Course Session Planner page. Complete the Course Session Table pages and click OK to set up the session, or click Cancel to quit without creating the session. The system then returns you to the Course Session Planner.

Facility

Select a **Facility** from the list of valid values. When you move out of the field, the system checks the Course Session Table for existing bookings and lists the dates and times when training rooms at the facility are booked. If the **Training Room Booked Time** group box is blank, there are no bookings for the **Facility**, and you can schedule the session at that facility for the selected dates.

Room Code

The system makes the **Room Code** field available when you complete the **Facility** field. Select a **Room Code** from the list of training rooms at the Facility. When you move out of the field, the system checks existing room bookings and updates the **Training Room Booked Time** group box to show only the bookings for the selected room. If the **Training Room Booked Time** group box is blank, there are no bookings for the **Room Code**, and you can schedule the session in the training room.

Language

Select the **Language** for the course session from the list of valid values. If the course isn't multilingual, the system makes this field unavailable for entry. You designate courses as multilingual on the Course Table - Course Profile Page.

Instructor

Select an **Instructor** from the list of qualified instructors. When you move out of the field, the system checks the instructor's availability and lists the dates and times when the instructor is unavailable in the **Instructor Booked Time** group box. The system checks the instructor's training schedule and their absence history.

If the **Instructor Booked Time** group box is blank, the instructor is available for the period that is specified by the **Start/End Dates** fields.

Training Room Booked Time

When you select a facility, the system displays existing bookings in the **Training Room Booked Time** group box for the **Start/End Dates** that you have specified.

For each room booking, the system displays the following information: **Facility, Room Number, Start Date, End Date, Start Time, and End Time**. Click the **Room Number** to view the Crse Session Planner Facility Page, where you can view the details of the booking.

If you select a facility, and the group box is empty, this means that the facility is free, and you can schedule the session for the dates and times you've selected.

Instructor Booked Time

When you select an **Instructor**, the system displays dates and times in the **Instructor Booked Time** group box, when the instructor is unavailable during the period specified by **Start/End Dates**.

For each period that the instructor is unavailable, the system displays the following information: **Instructor ID, Name, Start Date, End Date, Start Time, and End Time**. Click the instructor **Name** to view the Course Session Planner Instr Page, where you can view the reason that the instructor is unavailable.

If you select an instructor, and the group box is empty, this means that the instructor is free, and you can schedule the session for the dates and times you've selected.

Crse Session Planner Facility Page

Usage	Use the Crse Session Planner Facility page to view details of the room booking.
Object Name	TRN_PLAN_FAC_SEC
Navigation	To access the page, click the Room Number on the Course Session Planner page.

Crse Session Planner Facility		
Training Facility:	KCFAC1	Canadian Headquarters
Room Code:	ROOM1	Training Room 1
Course:	K001	Time Management
Session #:	0006	
Session Start Date:	08/11/2000	
Session End Date:	09/11/2000	
Start Time:	09:00	
End Time:	18:00	
Return		

Crse Session Planner Facility (course session planner facility) page

All data that is displayed defaults from the Course Session Table. This data is for information only and covers the following:

Training Facility

Room Code

Course The system displays the name of the course that is scheduled for the dates and times specified.

Session # (session number)

Session Start Date

Session End Date

Start Time

End Time

Course Session Planner Instr Page

Usage	Use the Course Session Planner Instr page to view the instructor's schedule for the selected period.
Object Name	TRN_PLAN_INSTR_SEC

Navigation	To access the page, click the instructor Name on the Course Session Planner page.
------------	---

Course Session Planner Instr.	
Instructor ID:	KC0015 Campbell,Barry Robert
Description:	Time Management
Start Date:	08/11/2000
End Date:	09/11/2000
Start Time:	09:00
Period End Time:	18:00
	Return

Course Session Planner Instr (course session planner instructor) page

The data on this page defaults from the employee’s absence history if the instructor is unavailable due to a planned absence, or from the Course Session Table if the instructor is scheduled to teach. This data is for information only and covers the following:

Instructor ID

Description

If the instructor is scheduled to teach, the system displays the name of the course. Otherwise, the system displays the reason for the instructor’s absence, which is recorded in the employee’s absence history.

Start Date

End Date

Start Time

End Time

Course Session Table - Course Session Profile Page

Usage	Use the Course Session Profile page to set up general information about the course session, including the start and end dates, the length of the session, the number of students that can be enrolled on the session, and the session language (if the course is multilingual).
Object Name	COURSE_SESSN_TBL1
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Course Session Profile • Develop Workforce, Administer Training (USF), Setup, Course

Session Table, Course Session Profile	
Prerequisites	To set up sessions for a course, you must have created the course in the Course Table, given it an Active status, and selected the Session Administration check box.
Access Requirements	Enter the Course Code and Course Session Number. If you're adding a new session, and you leave the Course Session Number blank, the system automatically generates a sequential Session Number. You can choose to reuse session numbers for completed or canceled sessions for new sessions later on.

Course Session Profile Location, Instructor Equipment Expense

Course: K012 Project Management **Course Status:** Active

Session Number: 0006 **School:**

***Session Status:** **Session Administration**

Start/End Dates: **Rescheduled**

Start/End Times:

Duration: **Duration Unit:**

Min Students/Session: **Max Students/Session:**

Session Language:

Vendor ID: Knowledge Transfer

Course Session Table - Course Session Profile page

Session Status

Select a **Session Status** from the following options:

Active: Use this status when you create a new course session. This is the default status when you add a new session. You can enroll students only in **Active** sessions.

Canceled: Use this status if the session has been canceled.

Complete: Choose this status when the course session has been completed.

For more information about using the Canceled or Complete status, see Closing Completed or Canceled Sessions.

Start/End Dates

Enter the session start and end dates in the **Start/End Dates** fields.

When you change the start date or end date of a course session, the system automatically updates the dates in the Student Training records for students that are on waiting lists for or enrolled in course sessions.

Start/End Times

Enter the start and end times of the course session.

Rescheduled

Select the **Rescheduled** check box if you change session information, such as dates or times, so that you know you've made changes to the original information. You must select the **Rescheduled** check box if you want to generate training letters to notify students of session changes.

When you select the **Rescheduled** check box and save the page, the system changes the letter code in the student training record to *RSC* (reschedule). If you've created a form letter to notify students of rescheduled sessions, you can generate letters notifying students of the change.

For more information about generating training letters, see "Enrolling or Waitlisting Students".

Session Administration

By default, the system selects this check box to indicate that you want to administer the course session using PeopleSoft Human Resources.

Clear the check box if you don't want to use your PeopleSoft Human Resources system to administer the course session.

Duration

The system populates the **Duration** field from the Course Table. If the session duration is different from this default, update the **Duration** field.

Duration Unit

The system populates the **Duration Unit** field from the Course Table. This is the unit in which the **Duration** is being measured. If you want to use a different unit, select a **Duration Unit** from the available options.

Min Students/ Session
(minimum students per session)

The system populates the minimum number of students from the Course Table. Update the **Min Students/Session** field if necessary.

Max Students/Session
(maximum students per session)

The system populates the maximum number of students from the Course Table. Update the **Max Students/Session** field if necessary.

If you're going to enroll students in this session automatically, using the Course Auto Enrollment page, you must enter a number in this field—if you don't, the system can't enroll any students in the class. Also, if you select a training facility code on the following Location, Instructor page, the system validates the number that you enter here against the maximum students that the room allows.

Session Language

Select the **Session Language** from the list of available options. The system makes the **Session Language** field available for entry if the course is designated as multilingual on the Course Table - Course Profile Page.

Vendor ID

Select a **Vendor ID** if you're outsourcing any part of this session to a vendor. Valid Vendor IDs are stored on the Vendor Table.

Course Session Table - Location, Instructor Page

Usage	Use the Location, Instructor page to set up the location of the course session and the course instructor. If you are dividing the course session into cut sessions, use this page to set up the start and end dates, the location, and the instructor for each cut session.
Object Name	COURSE_SESSN_TBL2A
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Location, Instructor • Develop Workforce, Administer Training (USF), Setup, Course Session Table, Location, Instructor
Prerequisites	<p>Before you can use this page, you need to set up some or all these tables:</p> <p>Training Facility Table. This table has details of the training facilities that your organization uses, and you can use it to track the availability and capacity of training rooms within the facility.</p> <p>Vendor Table. If you regularly use external companies to manage course sessions, you can add them to the Vendor Table and use this information throughout Administer Training.</p> <p>Instructor Table. This table contains all the instructors' profiles, including a list of the courses that each instructor is qualified to teach.</p>
Access Requirements	Enter the Course Code and Session Number.

Course Session Profile		Location, Instructor		Equipment		Expense	
Course:	K012	Project Management	Course Status:	Active			
Session #:	0006		Session Status:	Active			
Training Location View All First 1 of 2 Last							
Start/End Dates:	07/12/2000	08/12/2000	Start/End Times:	09:00	18:00		
Duration:	2.0	Duration Unit:	Day				
Facility:	KUFAC1	Corporation Headquarters	Vendor ID:				
Select free Training Room							
Room Code:	ROOM2	Training Room 2	Maximum Nbr of Students:	15			
Building:	2000						
Floor #:	2						
Instructor View All First 1 of 1 Last							
Vendor	Instructor ID	Name					
		KC0015		Campbell, Barry Robert			
Select free Instructor							

Course Session Table - Location, Instructor page

The system displays the **Course** code that you selected, the **Course Status**, the **Session #** (session number), and the **Session Status**. These fields are for information only.

Training Location

The **Training Location** group box contains details of all the locations that you will use for the course session. You can choose a training facility from the Training Facility Table or specify a vendor if the course is at an external site.

Start/End Dates

The system populates the **Start/End Dates** with the dates that you entered on the Course Session Profile page.

If the course session is divided into cut sessions, insert a row for each cut session, and adjust the **Start/End dates** for each row.

Start/End Times

The system populates the **Start/End Times** with the Start/End Times that you entered on the Course Session Profile page.

If the course session is divided into cut sessions, and the **Start/End Times** vary, adjust the **Start/End Times** for each cut session.

Duration

The system populates the **Duration** field from the Course Session Profile page.

If the course session is divided into cut sessions, adjust the **Duration** for each cut session. Make sure that the **Duration** of all the cut sessions totals the Duration of the Course Session.

Duration Unit	The system populates the Duration Unit field with the Duration Unit you entered on the Course Session Profile page. Select a different Duration Unit if the cut session is measured in another unit.
Facility	<p>If the session will take place at a facility that you've set up in the Training Facility Table, select the appropriate training Facility. When you move out of this field, the system automatically enters the facility name fields, and you can't change them.</p> <p>If the training facility isn't set up in the Training Facility Table, leave the Facility field blank and add the address to the Training Facility Address Page.</p>
Vendor ID	If a vendor is managing the course session, select a Vendor ID from the list of valid values. When you move out of this field, the system automatically enters the vendor name.
Select free Training Room	<p>Click Select free Training Room to display the Select Free Training Room Page. When you click the link, the system checks the training room bookings and displays a list of the training rooms that are available between the Start and End Dates you specified.</p> <p>The system makes Select free Training Room unavailable if you left Facility blank.</p>
Room Code	When you select a training room from the Select Free Training Room Page, the system displays the Room Code and the room name. The Room Code field isn't available for entry. To change it, click Select free Training Room again.
Building	When you select a training room for the session, the system displays the Building in which the room is located. This field isn't available for entry. Building is an optional field on the Training Facility Table - Training Rooms Page.
Floor # (floor number)	When you select a training room, the system displays the Floor # on which the room is located. This field isn't available for entry. The Floor # is an optional field on the Training Facility Table - Training Rooms Page.
Training Facility Address	Click Training Facility Address to display the Training Facility Address Page. This page displays the address of the Facility or Vendor that you selected. If you left both Facility and Vendor blank, the page is blank.

Maximum Nbr of Students (maximum number of students) When you select a training room, the system displays the **Maximum Nbr of Students** that the room accommodates. This field isn't available for entry. Set up training rooms on the Training Facility Table - Training Rooms Page.

Instructor

The **Instructor** group box lists the instructors who will teach the course session.

Vendor If the instructor is from a **Vendor**, select the vendor ID from the list of valid values. When you move out of this field, the system displays the vendor name alongside the **Vendor**.
If the instructor isn't employed by a vendor, leave **Vendor** blank.

Select free Instructor Click **Select free Instructor** to display the Select Free Instructor Page. When you click the link, the system checks the instructors' profiles and teaching schedules, and displays a list of qualified instructors that are available between the **Start** and **End Dates** you specified.

Instructor ID When you select an instructor from the Select Free Instructor Page, the system displays the **Instructor ID**. This field isn't available for entry. To change instructors, click **Select free Instructor** again.

Name When you select an instructor from the Select Free Instructor page, the system displays the instructor's **Name**. This field is available for entry if you don't specify a Vendor or if you don't select an Instructor ID from the Select Free Instructor page. To change instructors, click **Select free Instructor** again.

Training Facility Address Page

Usage	<p>Use the Training Facility Address page to view and update the address and contact details of the session or cut session.</p> <p>The system completes fields on this page from the Training Facility Table or the Vendor Table, depending on your selections on the Location, Instructor page:</p> <p>If you selected a Training Facility code, the system takes the contact and address from the Training Facility Table.</p> <p>If you selected a Vendor, the system takes the vendor address from the Vendor Table (the Contact Name and Phone Number is blank).</p> <p>If you left Training Facility and Vendor blank, the system leaves all the fields on the page blank.</p>
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Object Name	TRN_FACIL_ADDR_SEC
Navigation	To access the page, click Training Facility Address on the Location, Instructor page.

Training Facility Address

Facility: KUFAC1 Corporation Headquarters

Contact Name:

Phone:

Country: United States

Address 1:

Address 2:

Address 3:

City:

County:

Postal:

State: New York

Training Facility Address page

Contact Name

Enter the name of a contact at the training facility.

If you selected a Facility on the Location, Instructor page, the system defaults the contact name from the Training Facility Table - Contacts and Equipment Page. Update the name if necessary.

Phone

Enter the telephone number of the person named in **Contact Name**.

If the person has a business phone number specified, the system completes the **Phone** field automatically. Update the number if necessary.

Country

If you selected a Training Facility or Vendor on the Location, Instructor page, the system completes the **Country** and the address fields automatically, making these fields unavailable for entry.

If the **Country** field is blank, select the **Country** from the list of valid values. When you move out of the field, the system dynamically generates the proper address format for that country, as specified on the Country Table, Address Format page.

The address fields are common to multiple pages and are defined in PeopleBooks Standard Page Element Definitions.

Select Free Training Room Page

Usage	Use the Select Free Training Room page to choose a training room for the course session or cut session.
Object Name	TRN_ROOM_SEL_SEC
Navigation	To access the page, click Select free Training Room on the Location, Instructor page.

Select Free Training Room

Facility: KUFAC1 Corporation Headquarters

Training Room Availability View All First 1-2 of 2 Last

Room Code	Room Nbr
<input type="checkbox"/> ROOM1	Corporate Conference Room
<input type="checkbox"/> ROOM3	Training Room 3

OK Cancel

Select Free Training Room page

Training Room Availability

The **Training Room Availability** group box contains a list of the rooms at the Facility that are suitable for the session or cut session. The system displays those rooms that meet these criteria:

- Availability. The room must be available between the Start and End Dates that you specified on the Location, Instructor page.
- Capacity. The room must be able to accommodate the maximum number of students that you specified on the Course Session Profile page.

Room Code Select the check box next to the training room that you want to book for the session or cut session, and click **OK**.

Room Nbr (number) This is a display-only field, showing the room name. Set up the training rooms on the Training Facility Table.

Select Free Instructor Page

Usage	Use the Select Free Instructor page to choose an instructor for the course session or cut session.
Object Name	TRN_INSTR_SEL_SEC
Navigation	To access the page, click Select free Instructor on the Location, Instructor page.

Select Free Instructor

Course: K012 Project Management

Instructor Availability		
		View All First 1 of 1 Last
Instructor	Name	Vendor
<input type="checkbox"/> KGN001	Vaxhauer,Moira	

OK Cancel

Select Free Instructor page

Instructor Availability

The **Instructor Availability** group box contains a list of the instructors that are suitable for the session or cut session. The system includes only instructors that are:

- Qualified to teach the course. You define the courses that an instructor can teach on the Instructor Table - Qualification Page. If the course is multilingual, the system makes an additional check of the instructor’s language skills. Only instructors that can teach in the language you specified on the Course Session Profile page are included in the list. Record employee and non-employee language abilities on the Languages Page.
- Available between the Start and End Dates that you specified on the Location, Instructor page. The system checks both the instructor’s teaching schedule and the absence data. This ensures you can’t schedule instructors during periods of planned absence, such as a vacation.

Instructor Select the check box next to the instructor that you want to book for the session or cut session, and click **OK**.

Name This is a display-only field, showing the instructor’s name. Set up instructors on the Instructor Table - Instructor Profile Page.

Course Session Table - Equipment Page

Usage	Use the Equipment page to specify the equipment and materials that are required for the course session.
Object Name	COURSE_SESSN_TBL3A
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Equipment • Develop Workforce, Administer Training (USF), Setup, Course Session Table, Equipment
Prerequisites	Before you can use this page, you must set up your equipment codes on the Equipment and Materials Table Page.
Access	Enter the Course Code and Session Number.

Requirements

Course Session Profile		Location, Instructor		Equipment		Expense	
Course:	K012	Project Management	Course Status:	Active			
Session #:	0006		Session Status:	Active			
Training Room Equipment						View All First 1 of 2 Last	
Start Date:	07/12/2000	Facility:	KUFAC1	Corporation Headquarters		Training Facility Equipment	
		Room Code:	ROOM2	Training Room 2			
Fixed Equipment/Materials						View All First 1-2 of 4 Last	
Equip Code					Quantity		
K001	Overhead Projector				1		
K002	Hanging White Board				1		
Session Equipment/Materials						View All First 1-2 of 3 Last	
*Equip Code					Quantity		
<input type="text" value="K001"/>	<input type="text" value="Overhead Projector"/>			<input type="text" value="1"/>	<input type="button" value="+"/> <input type="button" value="-"/>		
<input type="text" value="K002"/>	<input type="text" value="Hanging White Board"/>			<input type="text" value="1"/>	<input type="button" value="+"/> <input type="button" value="-"/>		

Course Session Table - Equipment page

The system displays the **Course** code that you selected, the **Course Status**, the **Session #** (session number), and the **Session Status**. These fields are for information only.

Training Room Equipment

The **Training Room Equipment** group box displays details of the training facility that you selected on the Location, Instructor page. If you have divided the course session into cut sessions, check the details of the training facilities for each cut session.

Training Facility Equipment

Click **Training Facility Equipment** to display a list of the shared equipment that is available at the Training Facility. The system makes this link unavailable if you haven't specified a training facility.

Fixed Equipment/Materials

If you selected a training facility code on the Location, Instructor page, the system displays a list of the fixed equipment available in the selected training room. This data is for information only. Facility equipment is defined on the Training Facility Table - Training Rooms Page.

Session Equipment/Materials

Use the **Session Equipment/Materials** group box to specify the equipment and materials required for the course session. The system populates session equipment from the Course Cost - Vendor, Facility, and Equipment Page. Update the equipment list as required.

Equip Code (equipment code)

Select an **Equip Code** from the list of valid values. Set up Equipment/Material codes on the Equipment and Materials Table Page.

If you selected a training facility on the Location, Instructor page, you don't need to include in your list the fixed equipment shown in the **Fixed Equipment/Materials** group box.

Qty (quantity)

Enter the **Qty** required.

Insert additional rows to add further equipment codes.



To find out whether the equipment required for the course session is available at the training facility, generate the Equipment Checklist report.

Training Facility Equipment Page

Usage	Use the Training Facility Equipment page to view a list of the equipment and materials available at the Training Facility selected on the Course Session Table - Equipment page.
Object Name	TRN_FAC_EQUIP_SEC
Navigation	To access the page, click Training Facility on the Course Session Table - Equipment page.

Training Facility Equipment

Facility: KUFAC1 Corporation Headquarters

Facility Equipment/Materials View All First 1-3 of 3 Last

Equip Code		Quantity
K005	Photocopier	1
K009	TV Monitor with Video	1
K022	Lunch	50

[Return](#)

Training Facility Equipment page

Facility Equipment/Materials

The **Facility Equipment/Materials** group box lists the equipment that is available at the training facility. It includes only equipment that is shared between training rooms. The fixed equipment tied to individual training rooms isn't included in the list. Define training facility equipment on the Training Facility Table - Contacts and Equipment Page.

Course Session Table - Expense Page

Usage	Use the Expense page to define the miscellaneous expenses that are associated with a course session.
Object Name	COURSE_SESSN_TBL4A
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Expense • Develop Workforce, Administer Training (USF), Setup, Course Session Table, Expense
Prerequisites	You must set up your Tuition Expense Type Table Page before you can use this page.
Access Requirements	Enter the Course Code and Session Number.

Course Session Profile | Location, Instructor | Equipment | Expense

Course: K012 Project Management **Course Status:** Active
Session #: 0006 **Session Status:** Active

Expense View All First 1-2 of 2 Last

K03EXPN	Meals	+	-
K02EXPN	Exam Fees	+	-

Course Session Table - Expense page

The system displays the **Course** code that you selected, the **Course Status**, the **Session #** (session number), and the **Session Status**. These fields are for information only.

Expense

Use the **Expense** group box to create a list of the types of expenses that are associated with this course session. The system populates the **Expense** fields from the Course Cost - Instructor, Expense Page. Update the expense list as required.

Course Session Summary Page

Usage	<p>Use the Course Session Summary page to view details of a course session, including the start and end dates, the session location, and a list of students.</p> <p>If the course session hasn't completed, the system shows you who is enrolled or waitlisted for the session. If the course session has completed, the system shows whether the students completed the course and the grades obtained.</p>
Object Name	TRN_CRS_STUDNT_SUM
Navigation	Develop Workforce, Administer Training (GBL), Inquire, Course Session Summary, Course Session Summary
Prerequisites	None.
Access Requirements	Enter the Course Code and Session Number.

Course Session Summary

Course Code: K001 Time Management

Session # 0003

Start/End Dates 01/09/1999 02/09/1999 **Status:** Complete

Facility Canadian Headquarters **Language:** English

Session Summary			
EmpID	Name	Status	Grade
KC0033	Chan,Diana E	Completed	Pass
KU0038	Holsinger,Derek	Completed	Pass
KU0056	Ng,Edward	Completed	Pass
KU0059	Zinn,Vicki	Completed	Pass
KU0064	Wong,Benny	Completed	Pass

Course Session Summary page

The system displays the **Course Code** and **Session #** (session number) that you selected.

All data that is displayed on the Course Session Summary page defaults from the course session table. This data is for information only and covers the following:

Start/End Dates

Status

Facility

Language

Session Summary

The **Session Summary** group box lists the students associated with the course session.

EmplID (employee ID)

Name

Status

The system displays the session status:

Active: This is the default status when you add a new session.

Cancelled: This indicates that the session has been cancelled.

Complete: This indicates that the course session has completed.

Grade

If the student has successfully completed the course, the system displays the student's grade. You enter student grades on the Student Training - Course Student Enrollment Page.

Setting Up Course Session Costs

Now that you've set up Course Sessions, you can also track the specific costs that are associated with each session, such as vendor fees, facility fees, and so forth. This enables you to account for the fact that different sessions of the same course may cost your organization different amounts of money. For example, instructor and classroom space fees will probably vary if a course is taught in more than one geographical area or facility.

The course session costs default from the Course Cost Table. If you've already defined Course costs, you can modify these general costs at the session level.



You need to establish costs for training facilities only if you are working with Training Budgets.

Course Session Cost - Vendor Page

Usage	Use the Vendor page to enter vendor costs for a Course Session. If the vendor manages all training requirements, such as facilities, equipment, and instructors, for a single cost, then you need to enter only that amount here, without providing additional information on the other pages in the Course Session Cost Table.
Object Name	CRS_SESSN_TBL5_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Course Session Cost, Vendor • Develop Workforce, Administer Training (USF), Setup, Course

Session Cost, Vendor	
Prerequisites	Before you can use this page, you must set up the Course Session in the Course Session Table.
Access Requirements	Enter the Course Code and Session Number.

Course Session Cost - Vendor page

The system displays the **Course** that you selected, the **Course Status**, the **Session #** (session number), the **Session Status**, the **Start Date**, and the **Vendor** for the course session. These fields are for information only.

Per Unit Cost

Enter a **Per Unit Cost** amount for the Vendor that is associated with this Course Session, and select a cost currency from the list of valid values, if it is other than the default currency. If you didn't specify a vendor for this Course Session, then the **Per Unit Cost** field isn't available for entry.

Note. You specify the default currency for Business Units for a Budget Period on the Budget Period Table. Budgets for your organization are automatically converted to the default base currency for your organization that you establish on the Training Base Currency Table (TRN_BASE_CURRENCY).

Cost Unit

Select the **Cost Unit** that is associated with the amount in the **Per Unit Cost** field. For example, if you're tracking hourly charges, then select **Hour**. If the vendor bills you by the day, then select **Day** as your **Cost Unit**.

Business Unit	Select the Business Unit to which the vendor cost should be applied when you update your budgets, using the Compute Student Costs and Update Planned and Real Costs processes.
	<hr/> <p>Note. If you don't enter Business Unit and Department information here, then the system looks at the employee's record for this course session on the Course Session Enrollment page (COURSE_ENROLLMENT) when it processes the costs for budget processing purposes.</p> <hr/>
Department	Select the Department that is associated with the Business Unit
France	For French companies only, you'll define additional course session costs for the 2483 report requirements.
Financed Cost	Enter the Financed Cost if some or all of the training cost is being financed by an external fund.
Financing Fund	Select the Financing Fund used to finance the training costs. Valid values prompt from the Vendor Table.
Financing Department	Select the Financing Department to receive the funds. Valid values prompt from the Department Table.
Certified	Select the Certified check box if the vendor administering the course session is certified by the government.
Chargeable	Select the Chargeable check box if the vendor costs are chargeable to the company.
Billed	Select the Billed check box if you want the vendor cost to be included in your 2483 report. Clear the check box if you want to track the cost, but you don't want the cost reported in the 2483 report.
Date Entered	Enter the date that the agreement between the vendor and the government body was recorded in your system.
Agreement Date	Enter the start date for the agreement between the vendor and the government body.
Company	Select the government body with which the vendor has an agreement.



For more information about the French 2483 legal reporting requirement, see Producing the French Training Report 2483.

Course Session Cost - Facility, Instructor Page

Usage	Use the Facility, Instructor page to set up the session costs that are associated with the facility and instructor. If you have divided the course session into cut sessions, you need to enter costs for each cut session.
Object Name	CRS_SESS_TBL6A_GBL
Navigation	<ul style="list-style-type: none"> Develop Workforce, Administer Training (GBL), Setup, Course Session Cost, Facility, Instructor Develop Workforce, Administer Training (USF), Setup, Course Session Cost, Facility, Instructor
Prerequisites	Before you can use this page, you must set up the Course Session.
Access Requirements	Enter the Course Code and Session Number.

Vendor
Facility, Instructor
Equipment
Expense

Course: K012 Project Management **Course Status:** Active
Session #: 0006 **Session Status:** Active **Start Date:** 07/12/2000

Facility
[View All](#) First 1 of 2 Last

Start Date: 07/12/2000 **Vendor:**
Facility: KUFAC1 Corporation Headquarters
Room Code: ROOM2 Training Room 2

Per Unit Cost **Cost Unit** **Business Unit** **Department**

▼ 🇫🇷 France

Financed Cost **Financing Fund** **Financing Department**

Course Session Cost - Facility, Instructor page (1 of 2)

The screenshot shows a web-based form titled 'Instructor'. At the top right, there are navigation links: 'View All', 'First', '1 of 1', and 'Last'. The main content area is divided into several sections:

- Instructor:** KC0015 Campbell, Barry Robert
- Vendor:** (empty field)
- Per Unit Cost:** 750.00 (with a currency icon and 'CAD' dropdown)
- Cost Unit:** Day (dropdown)
- Business Unit:** (empty field with search icon)
- Department:** (empty field with search icon)
- Duration:** 2.0 (with a unit dropdown set to 'Day')
- France:** (indicated by a flag icon)
 - Financed Cost:** (empty field with currency icon and 'CAD' dropdown)
 - Financing Fund:** (empty field with search icon)
 - Financing Department:** (empty field with search icon)

Course Session Cost - Facility, Instructor page (2 of 2)

The system displays the **Course** that you selected, the **Course Status**, the **Session #** (session number), the **Session Status**, and the **Start Date**. These fields are for information only.

Facility

The **Facility** group box contains details of the training facilities where the course session will be held. This data defaults from the Course Session Table. If you didn't specify a training facility, the system makes the fields in this group box unavailable.

If you have divided the course session into cut sessions, you need to enter facility costs for each cut session.

Start Date

The system displays the **Start Date** for the session or cut session. This field is for information only.

Vendor

If the course session or cut session is being held at a vendor site, the system displays the **Vendor** and makes this field unavailable.

Facility

The system displays the **Facility** for the session or cut session. This field is for information only.

Room Code

The system displays the **Room Code** for the session or cut session. This field is for information only.

Per Unit Cost

Enter a **Per Unit Cost** amount for the **Facility** where the course session or cut session is held. Update the cost currency, if necessary.

Note. You specify the default currency for Business Units for a Budget Period on the Budget Period Table. Budgets for your organization are automatically converted to the default base currency for your organization that you establish on the Training Base Currency Table (TRN_BASE_CURRENCY).

Cost Unit	Select a Cost Unit from the available options. This is the unit in which the facility Per Unit Cost amount is measured. For example, if you're tracking hourly charges, then select Hour .
Business Unit	Select a Business Unit to which the facility cost should be applied when you update your budgets, using the Compute Student Costs and Update Planned and Real Costs processes.
Department	Select a Department that is associated with the selected Business Unit.



If you don't enter Business Unit and Department information here, then the system looks at the employee's record for this course session on the Course Session Enrollment page (COURSE_ENROLLMENT) when it processes the costs for budget processing purposes.



For more information about how Business Units impact your human resources system, see Regulating HRMS System Data.

France

For French companies only, you'll define additional course session cost financing information for the 2483 report requirements.

Enter the **Financed Cost** if some or all of the facility cost is being financed by an external fund.

Select the **Financing Fund** used to finance the facility costs from the available options. You define Financing funds in the Vendor Table.

Select the **Financing Department** that will receive the funds from the available options. You define your departments on the Department Table.



For more information about generating the French Training Report 2483, see Producing the French Training Report 2483.

Instructor

The **Instructor** group box contains details of the instructors that are assigned to the selected course session. The instructor data defaults from the Course Session Table - Location, Instructor Page, and the instructor costs default from the Instructor Table - Instructor Profile Page. If you didn't specify instructors, the system makes the fields in this group box unavailable.

If you have divided the course session into cut sessions, you need to enter instructor costs for each cut session.

Instructor	The system populates the Instructor field from the Course Session Table. This is for information only.
Vendor	If the instructor works for a vendor, the system displays the vendor ID and makes this field unavailable. If the instructor isn't from a vendor, the field is blank.
Per Unit Cost	Enter a Per Unit Cost amount for the Instructor that is associated with this course session or cut session. Select a currency from the list of valid values, if it is other than the default currency.
Cost Unit	Select a Cost Unit from the available options. This is the unit in which the instructor Per Unit Cost amount is measured. For example, if the instructors are charged at a daily rate, then select Daily as the Cost Unit .
Business Unit	Select a Business Unit to which the instructor cost should be applied when you update your budgets, using the Compute Student Costs and Update Planned and Real Costs processes.
Department	Select a Department that is associated with the selected Business Unit.
Duration	The system populates the Duration field from the Course Session Table. Don't update this field unless the instructor costs don't match the course session duration. For example, if the duration of the course session or cut session is 2.5 days, but the instructor charges for 3 days, you should update the Duration field on this page to 3 days. Updating Duration here doesn't change the data in the Course Session Table.

France

For French companies only, you'll define additional course session cost financing information for the 2483 report requirements.

Enter the **Financed Cost** if some or all of the instructor cost is being financed by an external fund.

Select the **Financing Fund** used to finance the instructor costs from the available options. You define Financing funds in the Vendor Table.

Select the **Financing Department** that will receive the funds from the available options. You define your departments on the Department Table.



For more information about generating the French Training Report 2483, see Producing the French Training Report 2483.

Course Session Cost - Equipment Page

Usage	Use the Equipment page to record costs that are associated with the equipment required for the course session.
Object Name	CRS_SESS_TBL7A_GBL
Navigation	<ul style="list-style-type: none"> Develop Workforce, Administer Training (GBL), Setup, Course Session Cost, Equipment Develop Workforce, Administer Training (USF), Setup, Course Session Cost, Equipment
Prerequisites	Before you can use this page, you must set up the Course Session.
Access Requirements	Enter the Course Code and Course Session Number.

Course Session Cost - Equipment page

The system displays the **Course** that you selected, the **Course Status**, the **Session #** (session number), the **Session Status**, and the **Start Date**. These fields are for information only.

Session Equipment/Materials

The system populates equipment or materials data from the Course Session Table. You cannot enter new equipment or materials for course session on this page. To update or modify that information, use the Course Session Table - Equipment Page.

If you didn't specify any equipment or materials for this Course Session, then the system makes the fields unavailable for entry.

Equip Code (equipment code)	The system displays the equipment code and description of the equipment. This field is for information only.
Per Unit Cost	Enter a Per Unit Cost amount for the item specified by Equip Code . Select a cost currency from the list of valid values, if you don't want to use the default Currency for this cost.
	<hr/> <p>Note. You specify the default currency for Business Units for a Budget Period on the Budget Period Table. Budgets for your organization are automatically converted to the default base currency for your organization that you establish on the Training Base Currency Table (TRN_BASE_CURRENCY).</p> <hr/>
Qty (quantity)	The system populates the equipment quantity from the Course Session Table. If you want to change this value, enter the new quantity. When you save the changes, the system updates the data in the Course Session Table.
Cost Unit	Select a Cost Unit from the available options. This is the unit in which the equipment Per Unit Cost amount is measured.
Business Unit	Select a Business Unit to which the equipment costs should be applied when you update your budgets using the Compute Student Costs and Update Planned and Real Costs processes.
Department	Select a Department that is associated with this Business Unit.



For more information about how Business Units impact your human resources system, see Regulating HRMS System Data.



If you don't enter Business Unit and Department information here, then the system looks at the employee's record for this course session on the Course Session Enrollment page (COURSE_ENROLLMENT) when it processes the costs for budget processing purposes.

France

For French companies only, you'll define additional course session cost financing information for the 2483 report requirements.

Enter the **Financed Cost** if some or all of the equipment costs are being financed by an external fund.

Select the **Financing Fund** used to finance the equipment costs from the available options. You define Financing funds in the Vendor Table.

Select the **Financing Department** that will receive the funds from the available options. You define your departments on the Department Table.



For more information about generating the French Training Report 2483, see Producing the French Training Report 2483.

Course Session Cost - Expense Page

Usage	Use the Expense page to record costs associated with the course session expenses. You can enter costs only for the expense types that you specified on the Course Session Table - Expense Page.
Object Name	CRS_SESSN_TBL8_GBL
Navigation	<ul style="list-style-type: none"> Develop Workforce, Administer Training (GBL), Setup, Course Session Cost, Expense Develop Workforce, Administer Training (USF), Setup, Course Session Cost, Expense
Prerequisites	Before you can use this page, you must set up the Course Session.
Access Requirements	Enter the Course Code and Session Number.

Vendor
Facility, Instructor
Equipment
Expense

Course: K012 Project Management **Course Status:** Active
Session #: 0006 **Session Status:** Active **Start Date:** 07/12/2000

Session Expenses View All First ◀ 1 of 1 ▶ Last

Expense Type:

Per Unit Cost	Cost Unit	Qty	Business Unit	Department
<input type="text" value=""/> USD	<input type="text" value="Hour"/>	<input type="text" value="1"/>	<input type="text" value=""/>	<input type="text" value=""/>

▼ **France**

Financed Cost	Financing Fund	Financing Department
<input type="text" value=""/> USD	<input type="text" value=""/>	<input type="text" value=""/>

Course Session Cost - Expense page

The system displays the **Course** that you selected, the **Course Status**, the **Session #** (session number), the **Session Status**, and the **Start Date**. These fields are for information only.

Session Expenses

Before you can enter cost information for any course session expenses, you need to associate expenses with a Course Session on the Course Session Table - Expense page. If you didn't specify any expenses for this Course Session, then the **Per Unit Cost** and currency fields are unavailable for data entry.

Expense Type

Per Unit Cost

Enter a **Per Unit Cost** amount for each **Expense Type** associated with this Course Session, and select a cost currency from the list of valid values, if it is other than the default currency.

Note. You specify the default currency for Business Units for a Budget Period on the Budget Period Table. Budgets for your organization are automatically converted to the default base currency for your organization that you establish on the Training Base Currency Table (TRN_BASE_CURRENCY).

Cost Unit

Select a **Cost Unit** from the available options. This is the unit in which the amount in **Per Unit Cost** is measured. For example, if you're tracking hourly charges for parking, then select **Hour**. If you reimburse a flat rate for parking, then choose **Flat Cost** as your **Cost Unit**.

Business Unit

Select a **Business Unit** and the Department to which the expense cost should be applied when you update your budgets, using the Compute Student Costs and Update Planned and Real Costs processes.

If you're entering information for more than one expense, you could specify that each one be billed to a different Business Unit and Department if appropriate.

Department

Select a **Department** that is associated with this Business Unit.



For more information about how Business Units impact your PeopleSoft Human Resources system, see Regulating HRMS System Data.



If you don't enter Business Unit and Department information here, then the system looks at the employee's record for this course session on the Course Session Enrollment page (COURSE_ENROLLMENT) when it processes the costs for budget processing purposes.

France

For French companies only, you'll define additional course session cost financing information for the 2483 report requirements.

Enter the **Financed Cost** if some or all of the expense costs are being financed by an external fund.

Select the **Financing Fund** used to finance the expense costs from the available options. You define Financing funds in the Vendor Table.

Select the **Financing Department** that will receive the funds from the available options. You define your departments on the Department Table.



For more information about generating the French Training Report 2483, see Producing the French Training Report 2483.

Closing Completed or Canceled Sessions

Once the course session has taken place—or when you cancel a session—you need to indicate in the system that this session is closed so that you won't mistakenly enroll students in it. Use the Course Session Table to indicate a change in session status.



For more information about the Course Session Table, see Planning and Setting Up Course Sessions.

To close or cancel a course session:

1. Select the course session from the course session table.

Go to the Course Session Table - Course Session Profile Page and select the session from the list of active sessions.

2. Change the Session Status to *Complete*, if the session has finished, or *Canceled*, to cancel the session.

If you set status to *Complete*, when you save your changes, this message appears: Student competencies/accomplishments will now be updated. When you click OK, the system updates:

- Student training profiles to show that the students enrolled in this session have completed this course.
- Students' competency profiles. The system assigns the competencies and accomplishments defined on the Course Table - Prereqs, Goals Page.

If you set the session status to *Canceled*, the system updates student data automatically and inserts a letter code of *CAN* (cancellation) so that you can generate letters notifying students of the session cancellation. You create letter codes in the Standard Letter Table Page.



For more information about generating training letters, see *Generating Administer Training Letters*.

Once you have set course Session Status to *Complete* or *Canceled*, you can no longer use the course session during enrollment and rescheduling.

3. If any students are on the waiting list for a canceled or complete session put the students back on the waiting list so that you can enroll them in other sessions.

If you have students with a status of *Session Waitlist*, use the *Course Wait List Page* to add them to the waiting list.

Recording Student Feedback

PeopleSoft Human Resources enables you to record students' evaluation of courses that you administer using the Administer Training business process. There are two options for recording student feedback:

Course Session Evaluations page. This page is for all users (US Federal users and commercial users). You use this page to record students' ratings for a given session. For each aspect of the training, you enter the number of students that submitted ratings of *Excellent*, *Good*, *Fair* or *Poor*.

Individual Training Evaluations component. This is available to US Federal users only. You use these pages to record an employee's evaluation of a given course session that the employee attended.

Course Session Evaluations Page

Usage	Use the Course Session Evaluations page to record student feedback on course sessions so that you know what areas need improvement. You can track course ratings for areas such as training facilities, instructors, course content, materials, and presentation. You can also review session statistics, including the number of responses per rating, average ratings, and the overall average for the session.
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Object Name	COURSE_EVALUATNS
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Course Session Evaluations, Course Session Evaluations • Develop Workforce, Administer Training (USF), Use, Course Session Evaluations, Course Session Evaluations
Prerequisites	The course session must have a status of <i>Complete</i> on the Course Session Table - Course Session Profile Page.
Access Requirements	Enter the Course Code and Session Number.

Course Session Evaluations

Course: K001 Time Management **Session #:** 0002

Start Date: 01/06/1999 **Facility:** Cdn HQ **Language:** English

Instructor View All First 1 of 1 Last

Campbell, Barry Robert KC0015

Ratings Area View All First 1 of 3 Last

	Average Rating	Total Count	Session Average	
*Rating Area: <input type="text" value="Content"/>	1.20	5	0.40	+ -

Ratings View All First 1-2 of 2 Last

*Rating	Rating Points	*Total Count	
<input type="text" value="Excellent"/>	1	<input type="text" value="4"/>	+ -
<input type="text" value="Good"/>	2	<input type="text" value="1"/>	+ -

Course Session Evaluations page

The system displays the **Course** code, the **Session #** (session number), the **Start Date**, and the **Language** of the session you selected. If you entered a **Facility** in the Course Session Table, the system displays the information here.

Instructor

If you entered an **Instructor** in the Course Session Table, the system displays the information here. This is for information only.

Ratings Area

Rating Area

Select a **Rating Area** from the list of options. Valid options are: *Content, Facility, Instructors, Materials, and Presentation.*

Average Rating	The Average Rating field shows the average rating for the selected Rating Area .
Total Count	The Total Count field shows the number of evaluations received for the Rating Area . This is the sum of all the Total Count fields in the Ratings group box.
Session Average	The Session Average rating is the overall average rating for the session. This is the average of the Average Rating values for all rating areas.

Ratings

Use the **Ratings** group box to enter students' evaluations of the area specified in **Rating Area**. Add a row for each **Rating** level. For example, if four students evaluated the *Content* area of the course session, with three students giving a rating of *Excellent* and one student giving a rating of *Good*, then you would add one row to record the number of *Excellent* ratings and one row for the *Good* ratings.

Rating	Select the Rating from the available options: <i>Excellent</i> , <i>Good</i> , <i>Fair</i> , and <i>Poor</i> .
Rating Points	The system displays the number of points associated with the Rating you selected. The points associated with each Rating are as follows: <i>1</i> - Excellent <i>2</i> - Good <i>3</i> - Fair <i>4</i> - Poor
Total Count	Enter the number of students that gave the Rating you selected.

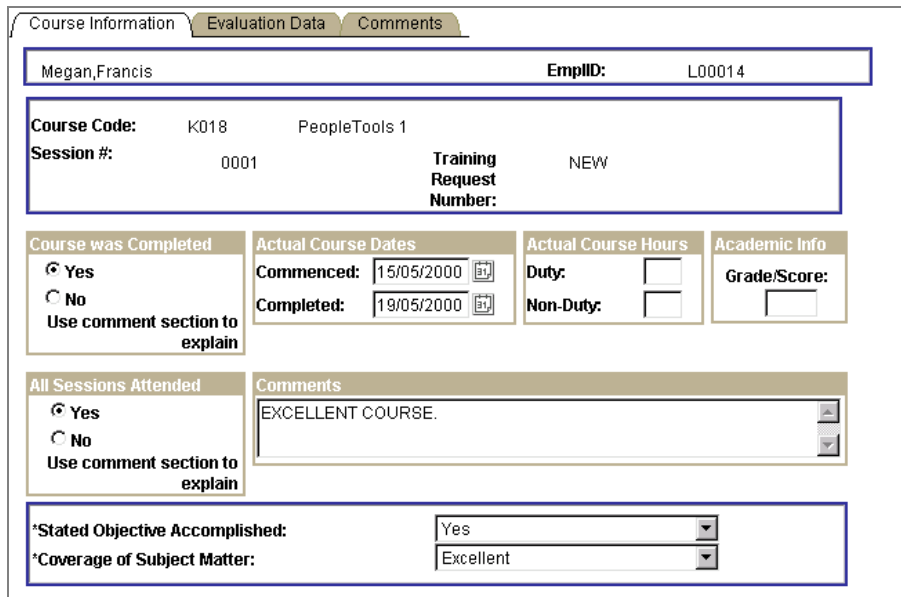
USF – Entering Individual Training Evaluation

US Federal users can enter detailed training evaluations for individual employees using the Individual Training Evaluation component, which consists of three pages:

- The Course Information Page is where you enter general course information and employee information, including the employee's attendance and the grade obtained.
- The Evaluation Data page is where you enter the employee's evaluation of the course.
- The Comments page is used for any additional comments you want to enter.

Individual Training Evaluation – Course Information Page

Usage	Use the Individual Training Evaluation – Course Information page to enter general information about the course, including the start and end date of the course session and the actual course hours. You also use the page to indicate whether the employee completed the entire course session, the grade obtained, and the employee’s overall rating of the course.
Object Name	GVT_TRNREQ_SEC_CE1
Navigation	Develop Workforce, Administer Training (USF), Use, Individual Training Evaluation, Course Information
Prerequisites	Before you can use this page, you must set up the course session in the course session table.
Access Requirements	Enter an Employee ID.



Individual Training Evaluation – Course Information Page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **EmplID** (employee ID).

The system displays the **Course Code**, **Session #** (session number), and the **Training Request Number** associated with the training. These fields are for information only.

Course was Completed Select *Yes* or *No* to indicate whether the employee completed the course.

All Sessions Attended Select *Yes* or *No* to indicate whether the employee attended every part of the course.

Comments If you need to enter further explanation of the responses to **Course was Completed** or **All Sessions Attended**, enter the information in the **Comments** field.

Actual Course Dates

Commenced Enter the start date of the course session.

Completed Enter the end date of the course session.

Actual Course Hours

Duty Enter the number of hours in training that are normally spent at work.

Non-Duty Enter the number of hours spent working or required for travel outside of duty hours.

Academic Info

Grade/Score If the employee was awarded a grade or score on completion of the course, enter this in the **Grade/Score** field.

Entering the Employee's Overall Evaluation

Stated Objective Accomplished Select one of the following options to indicate whether the objectives of the course were accomplished: *Yes*, *No*, or *Partially*.

Coverage of Subject Matter Select one of the following options to indicate how well the subject matter was covered: *Poor*, *Adequate*, or *Excellent*.

Individual Training Evaluation – Evaluation Data Page

Usage	Use the Individual Training Evaluation – Evaluation Data page to record an employee's feedback about various areas of the course such as the course materials, applicability of the course, and training facilities.
Object Name	GVT_TRNREQ_SEC_CE2
Navigation	Develop Workforce, Administer Training (USF), Use, Individual Training Evaluation, Evaluation Data
Prerequisites	Before you can use this page, you must set up the course session in the course session table.
Access Requirements	Enter an Employee ID.

Course Information	Evaluation Data	Comments
Megan,Francis		EmpID: L00014
TrngReq#: NEW	Course: K018	PeopleTools 1
*Organization of Subject Matter:	Well Organized	
*Suitability of Instr Materials:	Well Suited	
*Level of Difficulty:	Appropriate	
*Length of Course:	Appropriate	
*Amt of Outside or Evening Work:	Appropriate	
*Effectiveness of Instructors:	Excellent	
*Appl of Subject Matter to Work:	Significant	
*Facilities:	Excellent	
*Recommendations to Colleagues:	Highly Recommend	
*Meet Career Development Plans:	Yes	

Individual Training Evaluation – Evaluation Data Page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **EmpIID** (employee ID).

The system displays the **Course** and the **TrngReq#** (training request number) associated with the training. These fields are for information only.

Organization of Subject Matter

Select one of the following options to indicate how well the subject matter was organized: *Poorly organized, Adequate, or Well Organized.*

Suitability of Instr Materials (suitability of instructor’s materials)

Select one of the following options to indicate how suitable the instructor’s materials were: *Poorly suited, Adequate, or Well Suited.*

Level of Difficulty

Select one of the following options to indicate whether the course was at the correct level for the employee: *Appropriate, Too Advanced, or Too Elementary.*

Length of Course

Select one of the following options to indicate whether the course duration was correct: *Appropriate, Too Long, or Too Short.*

Amt of Outside or Evening Work (amount of outside or evening work)

Select one of the following options to indicate whether the amount of work that had to be completed outside the normal course hours was appropriate: *Appropriate, Insufficient, or Too Much.*

Effectiveness of Instructors

Select the option that reflects the employee’s rating of the instructors. The available options are: *Excellent, Good, or Poor.*

Appl of Subject Matter to Work (applicability of subject matter to work)

Select one of the following options to indicate the applicability of the course to the employee’s job: *Insignificant, Adequate, or Significant.*

- Facilities** Select the option that reflects the employee’s rating of the facilities. The available options are: *Excellent, Good, or Poor.*
- Recommendations to Colleagues** Select the option that reflects the employee’s recommendation. The available option are: *Highly Recommend, Recommend, or Not Recommend.*
- Meet Career Development Plans** Select one of the following options to indicate whether the course met the employee’s career development plans: *No, Yes, or Not Applicable.*

Individual Training Evaluation – Comments Page

Usage	Use the Individual Training Evaluation – Comments page to enter additional comments made by the employee about the strong or weak aspects of the training and the employee’s recommendations.
Object Name	GVT_TRNREQ_SEC_CE3
Navigation	Develop Workforce, Administer Training (USF), Use, Individual Training Evaluation, Comments
Prerequisites	Before you can use this page, you must set up the course session in the course session table.
Access Requirements	Enter an Employee ID.

Individual Training Evaluation – Comments Page

The following fields are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **EmpID** (employee ID).

The system displays the **Course** and the **TrngReq#** (training request number) associated with the training. These fields are for information only.

Strong Points	Enter the employee's comments about the strong points of the course.
Weak Points	Enter the employee's comments about the weak points of the course.
Were Your Objectives Met?	Enter any comments about how well the employee's objectives were met.
You Would Recommend Course to:	Enter the employee's recommendations.
Additional Comments	Enter any additional comments, if necessary.

CHAPTER 7

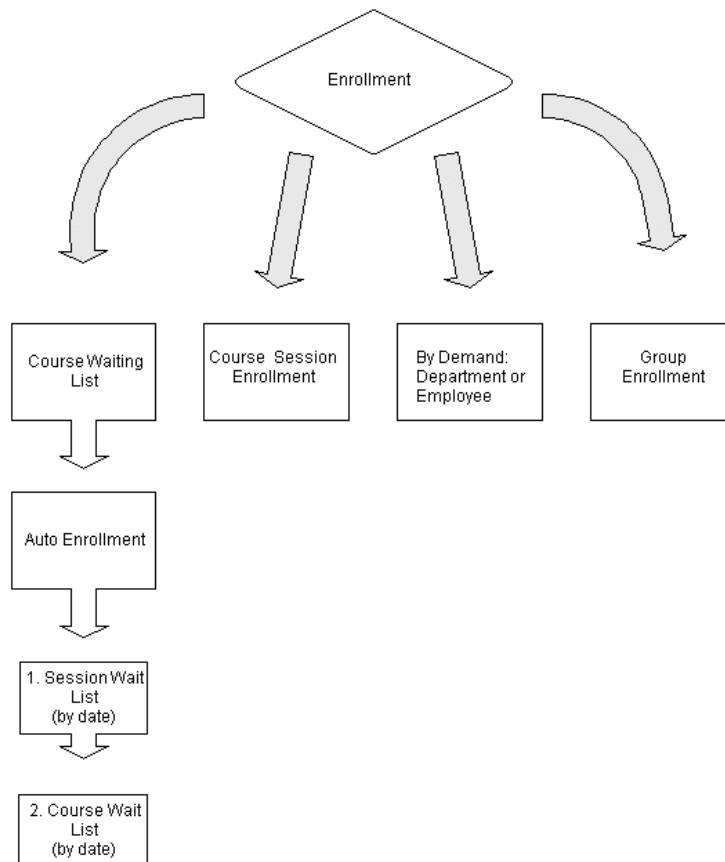
Enrolling or Waitlisting Students

Once you have set up your course sessions, you are ready to start enrolling students and adding students to course and session waiting lists. PeopleSoft Administer Training provides different methods of enrolling students so you can select the best option for your organization. For example, you may set up sessions in advance and publish a training schedule that students review to make their enrollment requests. Alternatively, you may prefer to set up waiting lists and only create course sessions when there are enough students on the list to fill the session.

This section discusses each of these methods of enrolling students.

Overview of Enrollment Options

There are a several ways you can enroll students in a course, including manual enrollment and automatic enrollment, that are illustrated below.



Enrollment options



When you use the Enroll by Department Demand, Enroll by Employee Demands, or Group Enroll components, students with a waitlist status also appear in the Course Waiting List, and students with an enrolled status appear in the Course Session Enrollment page.

For all the enrollment options, you can generate standard letters to notify students when you enroll them in a course or reschedule or cancel a course session.

Generating Administer Training Letters

With PeopleSoft Human Resources, you can implement automated procedures for sending a variety of form letters to students. By merging information automatically from PeopleSoft Human Resources with your Windows-based word processor, you can generate these letters in a fraction of the time it would take to generate them one at a time. The system will also send training letters by email to those students whose employee records include an email address.

PeopleSoft Human Resources delivers samples of three types of administer training letters:

- Confirmation of course session enrollment.

- Notification of course session rescheduling.
- Notification of course session cancellation.

Before you can generate any form letters, you must understand how this process works, how to set up your form letters, and how to set up the process scheduler.



For more information about setting up and generating form letters, see [Generating Form Letters](#).

To generate training letters:

1. Review (and update, if necessary) the Letter Codes that PeopleSoft Human Resources has inserted in the Administer Training pages for students to whom you'll send letters.

The system automatically enters Letter Codes on these pages:

- Course Auto Enroll. When you trigger automatic enrollment of students in a course session, the system displays a Letter Code of *CON* (confirmation) for all enrolled students.
- Course Session Enrollment
- Express Rescheduling
- Course Wait List
- Student Training. You can review Letter Codes for courses administered in-house on the Student Training page. The default values come from the Course Session Enrollment page.

In the first three Administer Training pages, for students on waiting lists, the system inserts the Letter Code *WTS* (for session wait list) or *WTC* (for course wait list). The system doesn't generate letters for these students because there are no sample letters for waiting list notifications.



For more information about creating new form letters, see [Adapting Form Letters](#).

Once the student records have Letter Codes, you can generate form letters at any time. You can generate letters as often as you like. For example, you might find that generating form letters once a week is sufficient. Alternatively, you might generate letters daily, especially if you generate a high volume of letters or require quick responses from letter recipients.

2. Run the Training Letters report to generate form letters containing student data. You can run the report for all course sessions scheduled within a defined period, for course sessions of a specified course within a defined period, or for one course session.

This report runs three processes: an SQR to extract data from PeopleSoft Human Resources, followed by a Microsoft Word for Windows macro to merge the data into a form letter

template. The final process is an Application Engine process that sends training letters by email to those students with an email address.

For students linked to course sessions that match the report parameters you select, the SQR extracts data from student records containing the Letter Code *CON* (confirmation), *CAN* (cancellation), or *RSC* (rescheduling), without a Date Printed value. Once you've run the Training Letters process, the system enters a Date Printed value in student records so that the next time you generate letters it won't create duplicate letters for them.



For more information about running the Training Letters report, see *Generating the Training Letters Report*.

3. Print the training letters using Microsoft Word for Windows. The system creates the form letters in a temporary directory on the application server, putting all the letters of the same type in one file.



For more information about changing the location of letter files, see *Setting up the Macros for your Environment*.

Enrolling Students Manually

Use the Course Session Enrollment page to enroll students individually in a session. This is particularly useful if you create course sessions before students request enrollment.

No matter how you enroll students—manually or automatically—this page is useful for reviewing session enrollments and making adjustments to student rosters and status. For example, some enrolled students might be unable to attend a session after all. Alternatively, because of an emergency training need, you may need to enroll a student currently on a waiting list.

On the Course Session Enrollment page, you can indicate the reasons that students are taking the course and your verification that students have met course prerequisites. If other students are eager to attend a session when spaces become available, you can also add them to the session waiting list for first priority during session rescheduling.

Course Session Enrollment Page

Usage	<p>Use the Course Session Enrollment page to enroll students, add them to a course session waiting list, or make adjustments to existing subscriptions. To remove students from a session, delete the row from the page.</p> <p>You can also use the page to check the results of your automatic enrollment. If you need to adjust several students, you might find it easier to restart automatic enrollment using the Course Auto Enroll</p>
-------	--

	page.
Object Name	COURSE_ENROLLMENT
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Course Session Enrollment, Course Session Enrollment • Develop Workforce, Administer Training (USF), Use, Course Session Enrollment, Course Session Enrollment
Prerequisites	Before you can enroll students in a course session, you must set up the session using the Course Session Table.
Access Requirements	Enter a course code and course session number.

Course Session Enrollment

Course: K001 Time Management **Session #:** 0007 Active

Start Date: 15/11/2000 **Start Time:** 09:00

Facility: Cdn HQ **Language:** French

Min Students: 5 **Max Students:** 10 [Prerequisite Checking](#)

Enrolled: 1 **# Waiting:** 0 [Transfer-Course Session Setup](#)

Attendance View All First 1 of 1 Last

EmpID: Saint-Amand, Marcel + -

***Enrollment/Attendance:** **Status Date:**

Trn Reason: Prerequisites Met

Letter Code: Confirmed **Date Letter Printed:** **Grade:**

Department

Business Unit: GBI BU for Canada

Department: Human Resources

Course Session Enrollment page (1 of 2)

Demand from Budget Training

Search Criteria:

Population Catalog Demand ID:

▼ **France**

Training Leave Part Time Course

Time Spent at Training: Hour

Course Session Enrollment page (2 of 2)

The system displays the **Course**, the **Session #** (session number), and the status of the session you selected. The system enters the following default data from the Course Session Table: **Start Date**, **Start Time**, **Facility**, session **Language**, the **Min Students** (minimum number of students) and **Max Students** (maximum number of students) permitted, and the number of students already

enrolled and waitlisted in the # **Enrolled** (number enrolled) and # **Waiting** (number waiting) fields. This data is for information only.

Prerequisite Checking

Click the **Prerequisite Checking** button to check whether a student has met the requirements for a course before confirming final enrollment. The system checks student training records to see if the selected employee has met the course prerequisites, which you specify on the Course Table - Prereqs, Goals Page.

If the student has met the prerequisites for a course, the system automatically selects the **Prerequisites Met** check box.

Transfer-Course Session Setup

Click the **Transfer-Course Session Setup** link to access the Course Session Table.

EmplID (employee ID)

Select the employee ID from the list of valid values.

Enrollment/Attendance

Select the student status from the available options:

Enrolled: Use this option to enroll a student in the session.

Session Waitlist: Use this option to add a student to a session waiting list.

You can change the student's status to any of the values in the Translate Table except **Course Waitlist** or **Currently Attending**. To add students to a course waiting list, use the Course Wait List page. To change student status to either **Course Waitlist** or **Currently Attending**, use the Student Training - Course Student Enrollment Page.

If you enroll more than the maximum number of students allowed in the session, the system issues a warning message when you save the page.

Request: This option is for US Federal (USF) users only. Use this status if you want to enter a training request. When you've entered the training request data, workflow automatically routes the request and tracks the process from the initial status of **Request**, on to **Authorized**, and finally to **Enrolled** or waitlisted.

Status Date

Enter the status date. The system uses the system date, usually today's date, as the default; you can override the default if necessary.

Waitlst Dt (waitlist date)

If the student is on a session waiting list, enter the waiting list date. The system hides this field when the student is enrolled in a training course.

Trn Reason (training reason) Select a reason for the training from the available options.

Prerequisites Met Select this check box if the student has met the course prerequisites. If you have set up prerequisites on the Course Table - Prereqs, Goals Page, the system checks the student's records for you and automatically selects the check box if the student has all the prerequisites.

Letter Code If you want to generate a form letter, select a **Letter Code**. The system uses one of the following codes, which correspond with the student status, as the default; you can change the default if necessary:

CON (confirmation). This code is used if the student status is **Enrolled**.

WTS. This code is used if the student status is **Session Waitlist**.

For more information about generating form letters, see *Generating Administer Training Letters*.

Date Letter Printed The system automatically populates the **Date Printed** field once you generate the letter.

Grade The system makes the **Grade** field available for entry when the student's status is **Completed**. Select a value from the list to indicate if the student passed the course.

Department

Business Unit The system populates an employee's Business Unit field from the employee's job data record. If you've enrolled a non-employee in a course session, the non-employee's business unit information comes from the information that you entered in the Add Non-Employee component.

Department The system populates an employee's department from the employee's job data record. If you've enrolled a non-employee, the department comes from the information that you entered in the Add Non-Employee component.

For more information about setting up non-employees, see *Administering Your Workforce*, "Hiring Your Workforce".

USF - Training Request Data

The following elements are used for entering and printing training requests and only appear if you are a US Federal user.

Enter a training request to request a training session and to track the student training processes. Such processes include accessing student data, maintaining student training data, viewing training summary information, tracking student tuition reimbursement, and reviewing training-related employee data. You must set the **Enrollment/Attendance** field to **Request** if you want to process training requests.

Trn Request (training request)

If you want to process training request information for an employee, select the **Trn Request** check box. When you select the check box, the system displays the **Trn Request Data** button and the **Print SF182** button.

Trn Request

Click the **Trn Request** button to display the USF - Employee Training Request Data Page.



Click the **Print SF182** button to print the Training Request Form (SF-182). The form is printed after you have completed and saved the request information.

Demand From Budget Training

In the **Demand from Budget Training** group box, you can link enrollments with a training demand (requirements) that you defined in the Budget Training business process. Making this link enables the system to compute the ratio between the costs you've planned for in your Budget Training module and the actual costs incurred for training that you track in the Administer Training module.

Select the **Population** or **Catalog** check box to sort through the available **Demand IDs**.

If you select the **Population** check box, the system displays all Budget Training demands with the following restrictions:

- The course session start and end date must be in the budget period of the demand.
- For individual demands, the EmplID of the demand must be the same as the **EmplID** you entered on this page.
- For general demands, the **EmplID** on the Course Session Enrollment page must be in the Demand Department list and in the Demand Job list.
- The course of the demand must be the same as the enrolling course.

If you select the **Catalog** check box and prompt for a **Demand ID**, the system displays all Budget Training demands, with the following restrictions:

- The course session start and end date must be in the budget period of the demand.
- When the demand course isn't **UNKNOWN**, the demand course must be the same as the current course.

- When the demand course is *UNKNOWN*, the demand subcategory must include the current course.
- When the course and subcategory for the demand are *UNKNOWN*, the demand category must include the current course.

If you select both check boxes, the system displays all Budget Training Demands, with the following restrictions:

- The course session start and end date must be in the demand budget period.
- For individual demands, the EmplId of the demand must be the same as the Student ID for the enrollment.
- For General Demands, the Student ID of the enrollment must be in the Demand Department list and in the Demand Job list.
- When the demand course isn't *UNKNOWN*, the demand course must be the same as the current course.
- When the demand course is *UNKNOWN*, the demand subcategory must include the current course.
- When the demand course and subcategory are *UNKNOWN*, the demand category must include the current course.



For more information about the budget training process and how to work with Training Demands, see *Determining Training Demands for Your Organization*.

Population

Select the **Population** check box if you want to look for people who entered a demand for the current course. The system uses the employee's department information to retrieve matching demands.

Catalog

Select the **Catalog** check box if you want to look for demands that are associated with the current course or with the demand category or subcategory that includes the current course. The system uses the catalog hierarchy to retrieve a demand for the current course.

Demand ID

When you select the search criteria, the system displays the budget training demands that match the criteria.

France

For French companies only, you'll define additional enrollment information required for the French Training Report 2483. This group box is for users of the PeopleSoft Human Resources commercial application. The system doesn't display the **France** group box if you're a US Federal user.

Training Leave

Select the **Training Leave** check box if the employee is taking the training course during his or her leave.

Part Time Course

Select the **Part Time Course** check box if you're enrolling the employee in a sandwich course, whereby the employee gains work experience while studying.

Time Spent at Training

If you selected the **Part Time Course** check box, enter the amount of time spent training and the unit in which the time is recorded (*Hour, Day*). You can only complete **Time Spent at Training** if the student has a status of *Incomplete*.

USF - Employee Training Request Data Page

Usage	Use the USF - Employee Training Request Data page to track employee training request data.
Object Name	GVT_TREQ_DATA_A
Navigation	To access the page, click the Trn Request button on the Course Session Enrollment page.

Employee Training Request Data

Training Request Number: NEW Training Request Date: 08/10/2000

Training Objectives: Non Government Training Days: Duty Hours: Non Duty Hours:

Training Codes

TC Purpose: TC Type: TC Source: TC SpecInt:

Name/Address of Vendor

Vendor ID:

Country:

Employee Training Request Data page (1 of 2)

The screenshot shows a web form titled "Location of Training Site". It contains the following fields and controls:

- Location:** A dropdown menu.
- Country:** A checkbox followed by a search icon.
- Address 1:** A text input field.
- Address 2:** A text input field.
- Address 3:** A text input field.
- City:** A text input field.
- County:** A text input field.
- State:** A text input field.
- Postal:** A text input field.
- Station Symbol:** A text input field.
- Document/Purchase Order/Req No:** A text input field.
- Direct Cost Appropriation/Fund:** A dropdown menu.
- Indirect Cost Appropriation/Fund:** A dropdown menu.
- Billing Instructions + Invoice:** A text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom left.

Employee Training Request Data page (2 of 2)

When you begin this page, the system automatically enters *NEW* as a **Training Request Number**. When you save this page, the system automatically assigns a number. The **Training Request Date** uses today's date as the default, but you can change it as necessary.

Enter the **Training Objectives** in the space provided.

Enter the **Non Government Training Days, Duty Hours, and Non Duty Hours**.

Training Codes

Select the training codes for **TC Purpose** (training code purpose), **TC Type** (training code type), **TC Source** (training code source), and **TC SpecInt** (training code special interest).

Name and Address of Vendor

Select the **Vendor ID** code. The system populates the vendor address from the Vendor Table and makes the fields unavailable for entry.

Location of Training Site

Select the **Location** of the training site from the list of available options. If you select *Same as Training Vendor*, the system populates the address from the Vendor Table and makes the fields unavailable for entry. If the address for the training site location isn't the same as the vendor's, select *Other* and enter the address of the training site.

Entering Estimated Costs and Billing Information

Enter the eight-digit **Station Symbol** using hyphens. Enter the **Document/Purchase Order/ Req No** (document, purchase order, or requisition number).

Enter the **Direct Cost Appropriation/Fund** chargeable and enter the appropriation or fund information.

Enter the indirect costs and appropriation or fund chargeable in the **Indirect Cost Appropriatn/Fund** (indirect cost appropriation or fund) field.

Describe any special **Billing Instructions + Invoice** (Furnish Invoice To:) in the space provided.

Enrolling by Department Demand

Use the Department Demand component to enroll employees based on a Department Demand that you defined in the Budget Training module.



For more information about establishing demands in the Budget Training module, see Defining Departmental Training Demands.

The Enroll by Department Demand component is composed of two pages. On the Department Demand page, you'll list all employees who qualify for training according to a set criteria. On the Subscriptions page, you'll list all employees who have subscribed to a training course who belong to the specified business unit and department for sessions that occur within the budget period.

Enroll by Department Demand - Department Demand Page

Usage	Use the Enroll by Department Demand - Department Demand page to enroll or add students to a waiting list who are included in a department demand.
Object Name	TRN_GNRL_DMND_SUBS
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Enroll by Department Demand, Department Demand • Develop Workforce, Administer Training (USF), Use, Enroll by Department Demand, Department Demand
Prerequisites	Before you can use this page, you must set up your Department Demands on the Department Demand Page.
Access Requirements	Enter a Budget Period, Business Unit, Demand ID, and Department.

Department Demand
Subscriptions

Budget Period: 1999 Training Budget Period

Business Unit: GBI BU for US004 [Demands Filter](#)

Demand ID: Project Management 24/ 16

Department: Human Resources 24/ 16 [Display Demands](#)

Matching Employees View All First 1-4 of 46 Last

Do	EmplID	Course Code	Session #	Start Date	End Date	Catalog
<input type="checkbox"/>	KUI017	<input type="text" value="K012"/>	<input type="text"/>			<input checked="" type="checkbox"/> Details
<input type="checkbox"/>	KUI007	<input type="text" value="K012"/>	<input type="text"/>			<input checked="" type="checkbox"/> Details
<input type="checkbox"/>	KU0117	<input type="text" value="K012"/>	<input type="text"/>			<input checked="" type="checkbox"/> Details
<input type="checkbox"/>	KU0115	<input type="text" value="K012"/>	<input type="text"/>			<input checked="" type="checkbox"/> Details

Subscribe Demand

*Attendance: Prerequisite Checking [Subscribe](#)

Enroll by Department Demand - Department Demand page

Select the **Budget Period** and **Business Unit** for the Department Demand that you want to enroll in a course session.

Select the **Demand ID** that you want to include in the enrollment process. The training demand includes information about the course in which the students should be enrolled, its category classifications, budget period dates, and employee qualification criteria.

Select the **Department** code for the employees you want to enroll in a session. You can only select from those departments included in the **Demand ID** that you specified. When you move out of the **Department** field, the system makes the **Display Demands** button available.

If you want to limit the search further, click the **Demands Filter** link to access the Demands Search Criteria Page where you can specify a category or subcategory from your training catalog, or a course. If you want to limit your demands using selection criteria after you click the **Display Demands** button and populated the **Matching Employees** group box, you need to cancel the page and start again.

Click the **Display Demands** button to populate the **Matching Employees** group box with employees who meet the selection criteria (such as department and job codes) defined within the **Demand ID**.

Matching Employees

Select the **Do** check box next to the **EmplIDs** (employee IDs) you want to enroll in the course session you selected, or to add them to the waiting list for the course or session you selected.

Use the **Course Code** to specify the course you want the employee to attend. The system populates the **Course Code** from the department **Demand ID** that you specified.

Select a **Session #** (session number) for the **Course Code** you selected for the employee. If you select a session that isn't within the budget period for this demand, the system issues the warning message *The course start date doesn't match with the budget period*. Select another session that is scheduled during the **Budget Period**.

When you move out of the **Session #** field, the system displays the **Start Date** and **End Date** of the session and selects the course **Catalog** check box if the session is in your training catalog.

Click the **Details** link to access the Employee / Course Details Page where you can view the employee's name and details of the course session that you've selected.

Subscribe Demand

In the Subscribe Demand group box, select the Attendance value to enroll the employees or add them to the course or session waiting list. Valid values are **Enrolled** (the default value), **Crse Wait** (course waitlisted), and **Sessn Wait** (session waitlisted). If you've already found matching employees and then reset the Attendance field, the system clears any session information that you may have entered for an employee.



For more information about enrolling students who are on course or session waiting lists into course sessions automatically, see Course Auto Enroll Page.

If you want the system to check to see if your students have met the prerequisites for a course specified on the Course Table, select the **Prerequisite Checking** check box. Students who haven't met the prerequisites won't be enrolled in the course when the system processes the request.

Once you've selected the employees you want to enroll or add to the waiting list, click the **Subscribe** button. Depending on the **Attendance** you selected, the system enrolls or waitlists students who have the **Do** check box selected.

Demands Search Criteria Page

Usage	Use the Demands Search Criteria page to limit the selection to a specific course or courses within a given category or subcategory.
Object Name	TRN_GN_DMND_CR_SEC
Navigation	To access the page, click the Demands Filter link on the Enroll by Department Demand - Department Demand page.

Demands Search Criteria

Category: Subcat: Course Code:

Demands Search Criteria page

To limit the search to a specific category or subcategory from your training catalog, select the **Category** from the list of available options.



You must select a category before you can select a subcategory code.

To limit the search to a specific subcategory, select the **Subcat** (subcategory) from the list of available options.

If you want to limit the search to a specific course, select the **Course Code** from the list of available options.

Click **OK** to return to the Department Demand page and then click the Display Demands button to populate the **Matching Employees** group box.

Employee / Course Details Page

Usage	Use the Department Demand - Employee / Course Details page to view information about the course session that you have selected for an employee on the Department Demand page. Use this information to decide how many of your demand students you can enroll in the course session that you specified before it fills up.
Object Name	TRN_GN_DMND_SEC
Navigation	To access the page, click the Details link on the Department Demand page.

Employee / Course Details		
EmpID:	KUI017	Rhett,Diandra
Course Code:	K012	Project Management
Session #:	0007	
Start Date:	14/06/1999	
End Date:	17/06/1999	
Min Students:	4	
Max Students:	8	
Enrolled:	0	
Waitlisted:	0	
Return		

Employee / Course Details page

All data displayed on this default from the Course Session Table. This data is for information only and covers the following: **EmpID** (employee ID), **Course Code**, **Session #** (session number), **Start Date**, **End Date**, **Min Students** (minimum number of students), **Max Students** (maximum number of students), number of students **Enrolled**, and number of students **Waitlisted**.

Enroll by Department Demand - Subscriptions Page

Usage	Use the Enroll by Department Demand - Subscriptions page to view the employees who were successfully subscribed to the courses and sessions that you selected on the Enroll by Department Demand - Department Demand page. You can also check on their status and the course enrollment dates.
Object Name	TRN_GNRL_TRAIN_SUB
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Enroll by Department Demand, Subscriptions • Develop Workforce, Administer Training (USF), Use, Enroll by Department Demand, Subscriptions
Prerequisites	Before you can use this page, you must subscribe employees using the Enroll by Department Demand - Department Demand Page.
Access Requirements	Enter a Budget Period, Business Unit, Demand ID, and Department.

Department Demand		Subscriptions					
Budget Period:	K1999CALYR	1999 Training Budget Period					
Business Unit:	US004	GBI BU for US004					
Department:	KU001	Human Resources	24 / 16				
Training Scheduled							
View All First 1-6 of 38 Last							
Demand	EmplID	Attendance	Course	Session #	Start Date	End Date	
000002	KU0068	Completed	K007	0001	06/10/1999	06/10/1999	Details
000003	KU0055	Completed	K012	0003	10/21/1999	10/29/1999	Details
000003	KU0054	Completed	K012	0003	10/21/1999	10/29/1999	Details
	KU0050	Completed	K003	0002	11/08/1999	11/08/1999	Details
000003	KU0050	Completed	K012	0003	10/21/1999	10/29/1999	Details
000003	KU0047	Completed	K012	0002	05/17/1999	05/25/1999	Details

Enroll by Department Demand - Subscriptions page

The system displays the **Budget Period**, **Business Unit**, and **Department** you selected. These fields are for information only.

Training Scheduled

In the **Training Scheduled** group box, the system lists the employees who were enrolled or waitlisted in the courses and course sessions you selected on the Department Demand page.

You can see the employee's **Demand ID**, **EmplID** (employee ID), and **Attendance** status. The system also displays the course session **Start Date** and **End Date** for your reference.

Click the **Details** link to access the Employee / Course Details Page where you can view the employee's name and details of the course session.

Employee / Course Details Page

Usage	Use the Subscriptions - Employee / Course Details page to view information about the course session that you have selected for an employee.
Object Name	TRN_TRAINING_SEC
Navigation	To access the page, click the Details link on the Enroll by Department Demand - Subscriptions page or Enroll by Employee Demand - Subscriptions page.

Employee / Course Details

EmplID: KU0050 Tyler, Sylena

Course: K012 Project Management **Prerequisites Met**

Session #: 0003

Start Date: 21/10/1999

End Date: 29/10/1999

Min Students: 4

Max Students: 8

Enrolled: 7

Waitlisted: 0

[Return](#)

Employee / Course Details page

All data displayed on this defaults from the Course Session Table. This data is for information only and covers the following: **EmplID** (employee ID), **Course**, **Session #** (session number), **Start Date**, **End Date**, **Min Students** (minimum number of students), **Max Students** (maximum number of students), number of students **Enrolled**, and number of students **Waitlisted**. The number of students enrolled or waitlisted includes the new students whom you subscribed on the Enroll by Department Demand - Department Demand page.

The system selects the **Prerequisites Met** check box if the student meets the requirements of the course.

Enrolling by Employee Demand

Use the Enroll by Employee Demand component to enroll your employees for training with the employee demand profile.

The Enroll by Employee Demand component is composed of two pages. On the Employee Demand page, you list all employees who qualify for training according to set criteria, and on the Subscriptions page you'll list all employees who have subscribed for a training course.



For more information about Demand IDs, see Determining Training Demands for Your Organization.

Enroll by Employee Demands - Employee Demands Page

Usage	Use the Enroll by Employee Demand - Employee Demands page to select the approved Employee Demands that you want to enroll in the requested courses.
Object Name	TRN_EMPL_DMND_SUBS
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Enroll by Employee Demands, Employee Demands • Develop Workforce, Administer Training (USF), Use, Enroll by Employee Demands, Employee Demands
Prerequisites	Before you use this page, you must set up employee demands using the Employee Demand Profile Page or the Employee Demand by Course Page.
Access Requirements	Enter a Budget Period and Business Unit.

Employee Demands Subscriptions

Budget Period: 2000 Training Budget Period [Demands Filter](#)

Business Unit: GBI BU for US004 [Display Demands](#)

Demand from Budget Training								View All	First	1 of 1	Last
Do	Demand ID	EmpID	Course Code	Session #	Start Date	End Date	Catalog				
<input type="checkbox"/>	000013	KU0015	<input type="text" value="K010"/>	<input type="text"/>			<input checked="" type="checkbox"/> Details				

Subscribe Demand

*Attendance: Prerequisite Checking [Subscribe](#)

Enroll by Employee Demand - Employee Demands page

The system displays the **Budget Period** and **Business Unit** you selected. These fields are for information only.

If you want to limit the search further, click the **Demands Filter** link to access the Demands Search Criteria Page where you can specify a category or subcategory from your training catalog, or a course. You can also specify that only employee demands with a certain priority are included in the search. If you decide that you want to limit your demands using selection criteria after you click the **Display Demands** button and populated the **Demand from Budget Training** group box, you need to cancel the page and start again.

Click the **Display Demands** button to populate the **Demand from Budget Training** group box with employees who meet the selection criteria.

Demand From Budget Training

Select the **Do** check box next to the **EmplIDs** (employee IDs) you want to enroll in the course session that you selected, or to add them to the waiting list for the course or session that you selected.

Use the **Course Code** to specify the course that you want the employee to attend. The system populates this field from the employee demand.

Select a **Session #** (session number) for the **Course Code** that you selected for the employee. If you select a session that isn't within the budget period for this demand, the system issues the warning message *The course start date doesn't match with the budget period.* Select another session that is scheduled during the **Budget Period**.

When you move out of the **Session #** field, the system displays the **Start Date** and **End Date** of the session and selects the course **Catalog** check box if the session is in your training catalog.

To populate the matching employees list in the **Demand from Budget Training** according to your category, subcategory, course, and priority selection criteria, click the **Display Demands** button. The system displays those employees who are approved for the specified course with your selection demand priority.

Subscribe Demand

In the **Subscribe Demand** group box, select the **Attendance** value to enroll the employees or add them to the course or session waiting list. Valid values are **Enrolled** (the default), **Crse Wait** (course waitlisted), and **Sessn Wait** (session waitlisted). If you've already populated the **Demand from Budget Training** group box and then reset the **Attendance** field, the system clears any session information that you may have entered for an employee.



For more information about enrolling students who are on course or session waiting lists into course sessions automatically, see [Course Auto Enroll Page](#).

If you want the system to check to see if your students have met the prerequisites for a course specified on the Course Table, select the **Prerequisite Checking** check box. Students who haven't met the prerequisites won't be enrolled in the course when the system processes the request.




Once you've selected the employees you want to enroll or add to the waiting list, click the **Subscribe** button. Depending on the **Attendance** you selected, the system enrolls or waitlists students who have the **Do** check box selected.

Demands Search Criteria Page

Usage	Use the Demands Search Criteria page to limit the selection to a specific course or courses within a given category or subcategory.
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Object Name	TRN_EE_DMND_CR_SEC
Navigation	To access the page, click the Demands Filter link on the Enroll by Employee Demand - Employee Demands page.

Demands Search Criteria

Category:  Subcat:  Course Code: 

Priority:

Demands Search Criteria page

To limit the search to a specific category or subcategory from your training catalog, select the **Category** from the list of available options.



You must select a category before you can select a subcategory code.

To limit the search to a specific subcategory, select the **Subcat** (subcategory) from the list of available options.

If you want to limit the search to a specific course, select the **Course Code** from the list of available options.

Click **OK** to return to the Employee Demands page and then click the Display Demands button to populate the **Demand from Budget Training** group box.

Employee / Course Details Page

Usage	Use the Employee / Course Details page to view information about the course session that you have selected for an employee on the Employee Demands page. Use this information to decide how many of your demand students you can enroll into the course session you specified before it fills up.
Object Name	TRN_EE_DMND_SEC
Navigation	To access the page, click the Details link on the Employee Demands page.

Employee / Course Details		
EmpID:	KU0015	Espinosa,Carmichael
Course Code:	K010	Leadership Skills for Managers
Session #:	0001	
Start Date:	03/07/2000	
End Date:	03/07/2000	
Min Students:	5	
Max Students:	10	
Enrolled:	0	
Waitlisted:	3	
Return		

Employee / Course Details page

All data displayed on this defaults from the Course Session Table. This data is for information only and covers the following: **EmpID** (employee ID), **Course Code**, **Session #** (session number), **Start Date**, **End Date**, **Min Students** (minimum number of students), **Max Students** (maximum number of students), number of students **Enrolled**, and number of students **Waitlisted**.

Enroll by Employee Demands - Subscriptions Page

Usage	Use the Enroll by Employee Demand - Subscriptions page to view the employees who were successfully subscribed in the courses and sessions that you indicated on the Enroll by Employee Demand - Employee Demands page. You can also check on their status and their course enrollment dates.
Object Name	TRN_EMPL_TRAIN_SUB
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Enroll by Employee Demands, Subscriptions • Develop Workforce, Administer Training (USF), Use, Enroll by Employee Demands, Subscriptions
Prerequisites	Before you can use this page, you must subscribe employees using the Enroll by Employee Demands - Employee Demands Page.
Access Requirements	Enter a Budget Period and Business Unit.

Employee Demands		Subscriptions				
Budget Period:	K2000CALYR	2000 Training Budget Period				
Business Unit:	US004	GBI BU for US004				
Training Scheduled						
					View All	First
					1-2 of 2	Last
Demand	EmplID	Attendance	Course	Session #	Start Date	End Date
000013	KU0015	Sessn Wait	K010	0001	07/03/2000	07/03/2000
	KU0015	Sessn Wait	K018	0001	03/13/2000	03/17/2000
						Details
						Details

Enroll by Employee Demand - Subscriptions page

The system displays the **Budget Period** and **Business Unit** you selected. These fields are for information only.

Training Scheduled

In the **Training Scheduled** group box, the system lists the employees who were enrolled or waitlisted in the courses and course sessions that you selected on the Employee Demands page.

You can see the employee's **Demand ID**, **EmplID** (employee ID), and **Attendance** status. The system also displays the course session **Start Date** and **End Date** for your reference.

Click the **Details** link to display the Employee / Course Details Page where you can view the employee's name and details of the course session.

Enrolling by Group

Use the Group Enrollment component to enroll some or all members of a group into a training course.

The Group Enrollment component is composed of two pages. On the Enroll Group page, you select employees and non-employees from the group you want to subscribe (enroll or waitlist) to a course. On the Subscriptions inquiry page, you can list group members who have subscribed for a training course.



For more information about creating groups, see Working With Groups.

Group Enrollment - Enroll Group Page

Usage	Use the Enroll Group page to select students from a group to subscribe to a course. You can subscribe all members of a group or select specific students by name or ID.
Object Name	TRN_GRP_ENROLL_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Group Enrollment, Enroll Group • Develop Workforce, Administer Training (USF), Use, Group Enrollment, Enroll Group
Prerequisites	Before you can use this page, you must define the group and create the course and course sessions in which group members will be enrolled or waitlisted.
Access Requirements	None

The screenshot shows the 'Enroll Group' page with the 'Subscriptions' tab selected. Search filters include:

- *Group ID: KTRAINING1 (Admin Training Birthdate Group)
- *Course: K001 (Time Management)
- Session #: 0008
- Facility: KGFAC1
- Language: English

 Options include Prerequisite Checking, Subscribe All, and a [Search by Name or ID](#) link. A yellow 'Refresh Search Fields' button is present.

A summary box titled 'Matching Employees' states: '20 students will be subscribed to course K001' and '1 to 25 of 66'. Navigation icons are provided below the summary.

Do	Student ID	Course	Session #	Start Date	End Date	Already Subscribed	Attendance	
<input checked="" type="checkbox"/>	K0G001	K001	0008	04/20/1999	04/21/1999	<input type="checkbox"/>	Sessn Wait	Details
<input checked="" type="checkbox"/>	K0G002	K001	0008	04/20/1999	04/21/1999	<input type="checkbox"/>	Sessn Wait	Details
<input checked="" type="checkbox"/>	K0G003	K001	0008	04/20/1999	04/21/1999	<input type="checkbox"/>	Sessn Wait	Details
<input checked="" type="checkbox"/>	K0G004	K001	0008	04/20/1999	04/21/1999	<input type="checkbox"/>	Sessn Wait	Details

Group Enrollment - Enroll Group page

Group ID

Select the **Group ID** from the list of valid values.

Group Comments

Click the **Group Comments** link to access the Comments Page where you can view a description of the group and the group definition.

Course	Select the Course from the list of valid values. When you move out of this field, the system displays the course name. If the course is multilingual, the system displays a warning that you must select a course session.
Session # (session number)	If you want to enroll the students in a specific session, select the Session # from the list of active sessions. This field is required for multilingual courses that don't have course waiting lists. Make sure that you select a session in a language that is appropriate for the group.
Facility	If you completed the Session # field, the system completes the Facility field using values from the Course Session Table - Location, Instructor Page. If you didn't specify a facility when you created the session, the field is blank. This field is unavailable for entry.
Language	If you completed the Session # field and the course is multilingual, the system completes the Language field from the Course Session Table. This field is unavailable for entry. You designate courses as multilingual on the Course Table - Course Profile Page.
Prerequisite Checking	Select the Prerequisite Checking check box if you want the system to check whether students meet the course prerequisites. Students are added to waiting lists even if they don't meet the prerequisites, and you can decide if they should attend the course. Check if the students met the prerequisites on the Subscription page.
Subscribe All	Select the Subscribe All check box if you want the system to automatically select the Do check box for all students listed in the Matching Students group box. For large groups, this saves you time selecting students to enroll or add to waiting lists.

Using Student Chunking Controls

Because the number of students could be very large, the system loads students into this page in chunks. You determine the number of rows in a chunk in the Max Number of Rows in Scrolls (maximum number of rows in scrolls) field on the Installation Table - Third Party/System Page. You manage the display of chunks using filters and navigation buttons.

Filters enable you to enter search criteria for identifying a chunk of students. On the Enroll Group page, click the **Search by Name or ID** link to access the filter fields. After entering information in the filter fields, click the **Load Students** button to populate the page with students who meet the search criteria. Navigation buttons enable you to move from one chunk to another.

Use the following filters and navigation buttons to move from one chunk of students to another:

Search by Name or ID Click the **Search by Name or ID** link to access the Name or ID Search Page where you can filter students by name or ID.

Refresh Search Fields Click the **Refresh Search Fields** button to clear the search criteria previously entered on the Name or ID Search page.

Load Students Click the **Search Students** button to display the results of a new search.

The system hides the **Load Students** button after populating the **Matching Employees** group box. The system then displays the button again when you select new search criteria or click the **Refresh Search Fields** button.

First Click the **First** button to display the first chunk of students.

Previous Click the **Previous** button to display the previous chunk of students.

Next Click the **Next** button to display the next chunk of students.

Last Click the **Last** button to display the last chunk of students.

Matching Employees

When you click the **Load Students** button, the system populates the **Matching Employees** group box with students who match the search criteria you entered. The system indicates which rows are visible, compared to the total number of rows. For example, *12 to 20 of 56* means that rows 12 to 20 are displayed out of a total of 56 rows.

The system checks each student's training records to find out if the student has attended the course, and then the following fields are completed accordingly:

Do Select the **Do** check box if you want to update the selected student's training data with the current data. For example, if you set a student's **Attendance** to *Enrolled* and complete the session details, when you save the page, the system only enrolls the student if you have selected the **Do** check box. The system ignores rows of data where the **Do** check box is cleared.

The **Do** check box is automatically selected if you selected the **Subscribe All** check box. You must clear the **Do** check box if you don't want to update the student's training data.

Student ID	The system displays the employee or non-employee ID in the Student ID field and makes this field unavailable for entry. To display the student's full name, click the Details link.
Course	The system populates the Course field with the course code that you selected and makes this field unavailable for entry. If you want to select a different course for the group, update the Course field at the top of the page and rerun the search.
Session #	<p>For a student with an Attendance of <i>Enrolled</i> or <i>Sessn Wait</i> (session waitlist), the system displays the session number in Session #. You can change the course session, and this won't affect other students in the list.</p> <p>For students with an Attendance of <i>Crse Wait</i> (course waitlist), the Session # field is blank. If you want to add the student to a course session, select the session from the list of active sessions. When you move out of the field, the system automatically makes the Attendance field blank, and you must set it to <i>Sessn Wait</i> or <i>Enrolled</i>.</p> <p>If the student has completed the course, the system displays the Session # and makes the field unavailable for entry.</p>
Start Date	If the student's Attendance is set to <i>Enrolled</i> , <i>Sessn Wait</i> , or <i>Completed</i> , the system populates the Start Date from the Course Session Table and makes the field unavailable for entry. This field is always unavailable for entry.
End Date	If the student's Attendance is set to <i>Enrolled</i> , <i>Sessn Wait</i> , or <i>Completed</i> , the system populates the End Date from the Course Session Table and makes the field unavailable for entry. This field is always unavailable for entry.

Already Subscribed

The system automatically selects the **Already Subscribed** check box if a student has already been enrolled in a course session or added to a waiting list via the Group Enrollment component. The check box is for information only; you can still change the subscription information on the page. For example, if a student has been previously added to a course waiting list, you can add the student to a session waiting list from this page by updating the **Attendance** and **Session #** fields.

If you subscribed the student using a different option (for example, if you used Course Session Enrollment to manually enroll the student), the system doesn't select this check box. Therefore, you can't modify the **Attendance** or the **Session #** for that student.

Attendance

If a student is waitlisted for the course, enrolled in a course session, or has completed the course, the system uses the **Attendance** value from the student's training records as the default. If the course isn't included in a student's training records, the system sets the student's **Attendance** status to *Crse Wait* or *Sessn Wait*. Here is a list of the valid values and when they are used:

Crse Wait: This status indicates that the student is on the course waiting list. The system sets **Attendance** to *Crse Wait* if a student hasn't been enrolled or waitlisted for the course and you left the **Session #** field blank. Update **Attendance** to *Enrolled* or *Sessn Wait* and complete the **Session** field if you want to enroll or add the student to a session waiting list.

Enrolled: This status indicates that the student is enrolled in the selected course session. When you first click the **Load Students** button, you only see *Enrolled* if the student has previously been enrolled in the course session (the system doesn't automatically enroll students on this page).

Sessn Wait: This status indicates that the student is on the course session waiting list. The system sets **Attendance** to *Sessn Wait* if a student hasn't been enrolled or waitlisted for the course and you specify a **Session #**. If you want to enroll the student in the session, change **Attendance** to *Enrolled*. The system displays a warning message if you have reached the maximum number of students for the course session.

Completed: This status indicates that the student has completed the course. Once a student has completed a course, you can't enroll that person in the course again, so the system makes all the fields in that row unavailable for entry.

You can't set a student's **Attendance** to **Completed** from this page; the system issues an error message if you select this status. To set a student's status to **Completed**, update the course session status on the Course Table - Course Profile Page.

Student/Course Details

Click the **Student/Course Details** button to access the Employee/Course Details Page where you can view the student's full name and the course session details.

Comments Page

Usage	Use the Comments page to view a description of the group selected on the Enroll Group page and the selection criteria used to build the group.
Object Name	TRN_GRPDESCGBL_SEC
Navigation	To access the page: Click Group Comments on the Enroll Group page or Click Group Comments on the Subscription page.

Comments

Group of employees used in Administer Training for enrolling purposes. The group holds students that were born from 1950 and before 1955.

Training Group

(Record (Table) Name	Field Name	Operator	Values List)
AND	JOB	EFFDT	CURR		
AND	JOB	EMPL_RCD	MAX		
AND	JOB	EFFSEQ	MAX		
AND	PERSONAL_DATA	BIRTHDATE	>=	1950-01-01	
AND	PERSONAL_DATA	BIRTHDATE	<	1955-01-01	

Return

Comments page

Comments

This page contains the description of the group and the criteria used to build the group. This data is for information only and is populated from the group definition pages in the Manage Human Resources menu.



For more information about creating groups, see Working With Groups.

Name or ID Search Page

Usage	Use the Name or ID Search page to select specific members of the group to enroll or add to waiting lists. You can search for students in the group by name or ID.
Object Name	TRN_GRPSON1GBL_SEC
Navigation	To access the page, click the Search by Name or ID link on the Enroll Group page.

Name or ID Search

Search on Name:

or

ID:

Name or ID Search page

Search on Name

Entering one or more letters in this filter field instructs the system to populate the Enroll Group page with employees and non-employees whose last names begin with the letters you entered.

ID

Entering one or more numbers in this filter field instructs the system to populate the Enroll Group page with employees and non-employees whose IDs begin with the numbers you entered.

Employee/Course Details Page

Usage	Use the Employee / Course Details page to view the full details of the course session for which the selected employee is enrolled or waitlisted.
Object Name	TRN_GRP_ENRGBL_SEC
Navigation	To access the page, click the Details link on the Enroll Group page.

Employee / Course Details		
Student ID:	K0G001	Jones,Susan
Course Code:	K001	Time Management
Session #:	0008	
Start Date:	20/04/1999	
End Date:	21/04/1999	
Min Students:	5	
Max Students:	10	
# Enrolled:	0	
# Waiting:	1	
Return		

Employee / Course Details page

All data displayed in the Employee / Course Details page comes from the Course Session Table and Course Session Enrollment page. This data is for information only and covers the following:

Student ID	The system displays the Student ID number and full name.
Course Code	The system displays the Course Code and course name.
Session # (session number)	If the student has been enrolled in or waitlisted for a session, the system displays the Session number.
Start Date	If the student has been enrolled in or waitlisted for a session, the system displays the Start Date of the course session.
End Date	If the student has been enrolled in or waitlisted for a session, the system displays the End Date of the course session.
Min Students (minimum number of students) and	If the student has been enrolled in or waitlisted for a session, the system displays the minimum number of students who can enroll in this session.
Max Students (maximum number of students)	If the student has been enrolled in or waitlisted for a session, the system displays the maximum number of students who can enroll in this session.
# Enrolled (number enrolled)	If the student has been enrolled in or waitlisted for a session, the system displays the number of students currently enrolled in the course session. This number doesn't include any students on the Enroll Group page whose Attendance you manually set to <i>Enrolled</i> . Only when you save the Enroll Group page does the system update the course session enrollment data.

Waiting (number waiting) If the student has been enrolled in or waitlisted for a session, the system displays the number of students currently on the session waiting list.

Group Enrollment - Subscriptions Page

Usage	Use the Subscriptions page to view the students who were successfully subscribed into the courses and sessions that you indicated on the Enroll Group page. You can also check whether they met the course prerequisites and the course enrollment dates.
Object Name	TRN_GRP_SUBS_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Group Enrollment, Subscriptions • Develop Workforce, Administer Training (USF), Use, Group Enrollment, Subscriptions
Prerequisites	Before you can use this page to view enrollments, you must complete the Enroll Group page and save the changes.
Access Requirements	None

Enroll Group Subscriptions

Group ID: KTRAINING1 Admin Training Birthdate Group [Group Comments](#)

Course: K001 Time Management

[Search on Name or ID](#) [Refresh Search Fields](#)

Training Scheduled

1 to 2 of 2

This group has 0 students Enrolled, 2 Session Waitlisted and 0 Course Waitlisted, for Course K001.

Student ID	Session #	Start Date	End Date	Attendance	Prerequisites Met
K0G001	0006	11/08/2000	11/09/2000	Sessn Wait	<input type="checkbox"/>
K0G002	0006	11/08/2000	11/09/2000	Sessn Wait	<input type="checkbox"/>

1 to 2 of 2

This group has 0 students Enrolled, 2 Session Waitlisted and 0 Course Waitlisted, for Course K001.

Training Scheduled

Group Enrollment - Subscriptions page

Group Comments

Click **Group Comments** to access the Comments Page where you can view a description of the group and the group definition.

Using Student Chunking Controls

Because the number of students could be very large, the system loads students into this page in chunks. You determine the number of rows in a chunk in the Max Number of Rows in Scrolls (maximum number of rows in scrolls) field on the Installation Table - Third Party/System Page. You manage the display of chunks using filters and navigation buttons.

Filters enable you to enter search criteria for identifying a chunk of students. On the Subscriptions page, click the **Search on Name or ID** link to access the filter fields. After entering information in the filter fields, click the **Load Students** button to populate the page with students who meet the search criteria. Navigation buttons enable you to move from one chunk to another.

Use the following filters and navigation buttons to move from one chunk of students to another:

Search on Name or ID	Click the Search on Name or ID link to access the Name or ID Search Page where you can filter students by name or ID.
Refresh Search Fields	Click the Refresh Search Fields button to clear the search criteria previously entered on the Name or ID Search page. When you click this button, the system displays the message <i>Search Fields have been cleared.</i>
Load Students	Click the Load Students button to display the results of a new search. The system hides the Search Students button after populating the Training Scheduled group box. The system then displays the button again when you select new search criteria or click the Refresh Search Fields button.
First	Click the First button to display the first chunk of students.
Previous	Click the Previous button to display the previous chunk of students.
Next	Click the Next button to display the next chunk of students.
Last	Click the Last button to display the last chunk of students.

Training Scheduled

When you click the **Load Students** button, the system populates the **Training Scheduled** group box with students who match the search criteria you entered. The system indicates which rows are visible, compared to the total number of rows. For example, *12 to 20 of 56* means that rows 12 to 20 are displayed out of a total of 56 rows.

The **Training Scheduled** group box lists the students in the group who are scheduled to attend the selected course. All data displayed is for information only and covers the following:

Student ID	The system displays the employee ID or non-employee ID in the Student ID field.
Session # (session number)	If the student has been enrolled in or waitlisted for a session, the system displays the Session # .
Start Date	If the student has been enrolled in or waitlisted for a session, the system displays the Start Date of the course session.
End Date	If the student has been enrolled in or waitlisted for a session, the system displays the End Date of the course session.
Attendance	<p>The system displays the student’s Attendance status. The valid values on this page are:</p> <p><i>Crse Wait</i> (course waitlist)</p> <p><i>Enrolled</i></p> <p><i>Session Wait</i> (session waitlist)</p> <p>See the Enroll Group page for a full description of the Attendance field.</p>
Prerequisites Met	<p>If you selected the Prerequisite Checking check box on the Enroll Group page, the system checks if students have met the course prerequisites. When you display the Subscriptions page, the system selects the Prerequisites Met check box if the student has met the course prerequisites and clears it if the student doesn’t meet the prerequisites.</p> <p>Set up course prerequisites on the Course Table - Prereqs, Goals Page.</p>

Name or ID Search Page

Usage	Use the Name or ID Search page to select the members of the group whose details you want to view. You can search for students in the group by name or ID.
Object Name	TRN_GRPSON2GBL_SEC
Navigation	To access the page, click the Search on Name or ID link on the Subscriptions page.

Name or ID Search

Search on Name:

or

ID:

OK Cancel

Name or ID Search page

Search on Name

Entering one or more letters in this filter field instructs the system to populate the Subscriptions page with employees and non-employees whose last names begin with the letters you entered.

ID

Entering one or more numbers in this filter field instructs the system to populate the Subscriptions page with employees and non-employees whose IDs begin with the numbers you entered.

Managing Waiting Lists

You might find that it's most cost-effective to set up new sessions only when enough students want to take a particular course. Therefore, you'll want to put students on waiting lists in order to track course demand. You can review the lists to determine when you should create new sessions and ensure enrollment fairness by enrolling students in the order of the date on which they were added to the waiting list. Use the Course Wait List Page to review the waiting list for a course and add employees and non-employees to the waiting list.



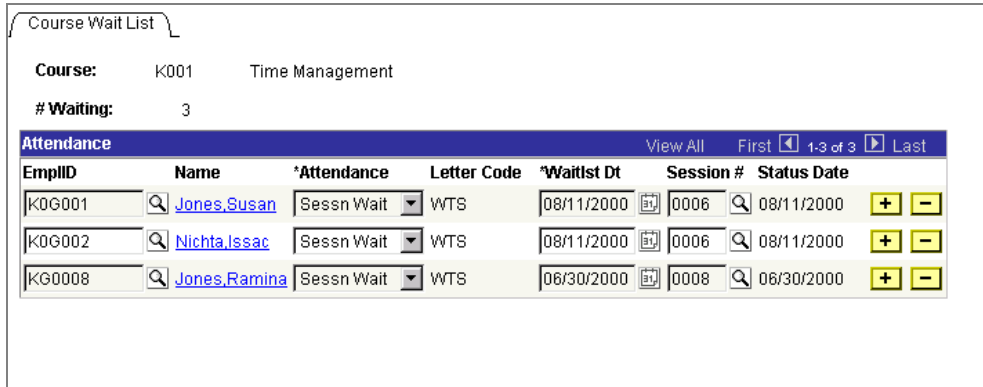
You'll see employees with a waitlist status on the Enroll by Department Demand, the Enroll by Employee Demand, and the Group Enrollment components for a course in the Course Wait List page. The Enroll by Department Demand, Enroll by Employee Demand, and Group Enrollment options automatically include waitlisted employees on the Course Wait List for the appropriate courses.

Use the Course Auto Enroll Page to automatically enroll students on your waiting list into a given session. The system first enrolls those students with a *Sessn Wait* (session waitlist) status for the session specified. If any places are still open, the system then enrolls any students with a *Crse Wait* (course waitlist) status.

Course Wait List Page

Usage	Use the Course Wait List page to put employees and non-employees on waiting lists and to assign an enrollment status.
Object Name	COURSE_WAIT_LIST

Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Course Waiting List, Course Wait List • Develop Workforce, Administer Training (USF), Use, Course Waiting List, Course Wait List
Prerequisites	First set up the course in the Course Table and give it a status of <i>Active</i> .
Access Requirements	Enter a Course code.



Course Wait List page

The system displays the **Course** you selected and the number of people on the waiting list for that course (**# Waiting**). These fields are for information only.

Attendance

The **Attendance** group box lists the students on the waiting list for the selected course. Insert additional rows to add students to the waiting list. For each student, the system displays the following information:

EmplID (employee ID) Select an **EmplID** from the list of valid values. When you move out of the **EmplID** field the system displays the student’s **Name**. You can add employees or non-employees to a waiting list.

Name The system completes the **Name** when you select the **EmplID**. Click the student’s name to access the Course Waitlist Details Page where you can view more information about the course session that you selected.

Attendance Select an **Attendance** from these two options (the other options in the list aren’t valid for this page):

Crse Wait (course waitlist): This option means that the student would like to enroll in any session of the course that becomes available and implies that you haven’t yet set up any open sessions for them to request.

Sessn Wait (session waitlist): Select this status to waitlist a student for a particular course session. To select this status, you must have already created the session in the Course Session Table and given it a status of *Active*. **Sessn Wait** gives this student priority over students with a **Crse Wait** status.

Note. For multilingual courses, you can't add a student to a course waiting list (**Crse Wait** status). You must use **Sessn Wait** to add the student to a session waiting list and select a session in the student's language.

Letter Code

PeopleSoft Human Resources enters a default **Letter Code**, according to the student's waiting list status. For course waitlisted students, the letter code is **WTC**, and for session waitlisted students, it is **WTS**. If you've created waiting list form letters, once you save the information you've entered on this page, you can generate letters notifying students of their waiting list status. You create letter codes on the Standard Letter Table Page.

For more information about form letters, see *Generating Administer Training Letters*.

Waitlist Dt (waitlist date)

The **Waitlist Dt** uses the system date as the default; you can override the default if the student actually requested the course on a different date. The system uses this date to enroll students, from the oldest date to the most recent.

The system sorts students by session number in ascending order. Within each session, it sorts students by status (session waitlist first and course waitlist second), waitlist date, and ID. Non-employees appear after employees, using the same sort sequence. This is the same sequence the system uses for automatic enrollment.

Session # (session number)

If you selected an **Attendance** of *Sessn Wait*, select the **Session #** from the list of *Active* sessions. When you leave this field, the system completes the fields for **Start Date**, **Facility**, and **Language** (if it's a multilingual course).

Status Date

This field is unavailable for entry. The system uses the system date, usually today's date, as the default **Status Date**.

Course Waitlist Details Page

Usage	Use the Course Waitlist Details page to view full details of the course or course session for which the selected student is waitlisted.
Object Name	CRSE_WAITLIST_SEC
Navigation	To access the page, click the student's Name on the Course Wait List page.

Course Waitlist Details

EmplID: KG0008 Jones, Ramina

Course Code: K001 Time Management

Session #: 0008

Session Status: Active

Start Date: 20/04/1999

Facility: Reading - England

Language:

[Return](#)

Course Waitlist Details page

All data displayed on this page comes from the Course Session Table and Course Session Enrollment page. This data is for information only and covers the following:

- EmplID** (employee ID) The system displays the student's ID number and full name.

- Course Code** The system displays the **Course Code** and course name.

- Session #** (session number) If the student has been waitlisted for a session, the system displays the **Session #**.

- Session Status** The system displays the **Session Status**.

- Start Date** If the student has been waitlisted for a session, the system displays the **Start Date** of the course session.

- Facility** If the student has been waitlisted for a session, the system displays the training **Facility** for the session.

- Language** If the course is multilingual, the system displays the **Language** in which the course session will be taught.

Course Auto Enroll Page

Usage	Use the Course Auto Enroll page to enroll students automatically in a course session. If you've set up waiting lists for students waiting for either courses or sessions, you can streamline the enrollment process by
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	<p>triggering automatic system enrollment. The Course Auto Enroll page saves you from having to enroll students one by one and ensures that students are enrolled in the right order.</p> <p>If you've given a student a status of <i>Sessn Wait</i> (session waitlist) for several sessions of a course and perhaps one status of <i>Crse Wait</i> (course waitlist), when the student is enrolled using automatic enrollment, the system automatically deletes all the other data rows for the student in the waiting list for this course.</p>
Object Name	COURSE_AUTO_ENROLL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Course Auto Enrollment, Course Auto Enroll • Develop Workforce, Administer Training (USF), Use, Course Auto Enrollment, Course Auto Enroll
Prerequisites	Before you can enroll students in course sessions, you must have already created the session in the Course Session Table, given it a status of <i>Active</i> , and entered a maximum number of students per session.
Access Requirements	Enter a Course Code.

Course Auto Enroll

Course: K006 Conducting Performance Reviews

Waiting: 2

Auto-Enrollment

Session #: **Max Students:** 0

Attendance						
Student Name	ID	Status	Status Date	Waitlist Dt	Sessn	Letter Code
Griffiths, Martina Rae	KC0001	Sessn Wait	06/09/2000	06/09/2000	0002	WTS
Reid, Charles M	KC0004	Sessn Wait	06/09/2000	06/09/2000	0002	WTS

Course Auto Enroll page



If you're managing training budgets, the Course Auto Enroll process links costs to the appropriate Department and/or Demand in the Budget Training module. This isn't necessarily the department in which the employee works, as specified on the Job Record, but rather the department to be billed for the employee's training costs.

The system displays the **Course** you selected and the number of students waiting to enroll in the course (**# Waiting**). These students are listed in the **Attendance** group box. The system displays those on session waiting lists first, followed by students on the course waiting list.

Auto-Enrollment

To start system automatic enrollment, select a **Session #** (session number) from the list of active sessions. When you move out of the field, the system issues one of two warning messages. If the course session that you specified is already full, then the system displays a message indicating that the course session you selected is overenrolled. When you click **OK**, you can either select another **Session #** or **Cancel** to leave the page.

If the session isn't full, the system issues a message indicating how many slots are available in the course session. When you click **OK**, the system enrolls students up to the maximum number allowed for the session, as shown in **Max Students** (maximum number of students). The system first enrolls students who are on the waiting list for the session—where the **Status** is *Sessn Wait* (session waitlist) and **Sessn** (session) matches the session that you selected in **Session #**. The students are enrolled in order of **Waitlist Dt** (waitlist date) so that the students who have been on the waiting list the longest are enrolled first and employees are enrolled before non-employees.

Once students on the session waiting list are enrolled, the system displays a message indicating how many spaces, if any, are still available. If spaces are available, when you click **OK**, the system enrolls students on the course waiting list—where the **Status** is *Crse Wait* (course waitlist). Again, students are enrolled in order of the **Waitlist Dt**, with employees having priority over non-employees.

Once these students are enrolled, the system displays another message indicating the number of spaces available or a message indicating that the course is full.

Attendance

When you first enter the Course Auto Enroll page, the **Attendance** group box shows all employees and non-employees who are on either session waiting lists or the course waiting list. The system displays students sorted by **Sessn** number in ascending order. Within each session, it sorts students by **Status**, with *Sessn Wait* taking first priority and *Crse Wait* taking second priority, then according to **Waitlist Dt**, and then by **ID**. Non-employees appear after employees, using the same sort sequence.

Once you select the **Session #**, the system updates the student details. All students now enrolled in the course session have a **Status** of *Enrolled*. The system also displays a **Letter Code** of *CON* (confirmation), so that you can generate form letters informing students of their enrollment.



For more information about generating form letters, see [Generating Administer Training Letters](#).

Once you've saved the Course Auto Enroll page, you can move to the Course Session Enrollment page to make any necessary adjustments to the enrollees in this session.

Moving Students Between Course Sessions

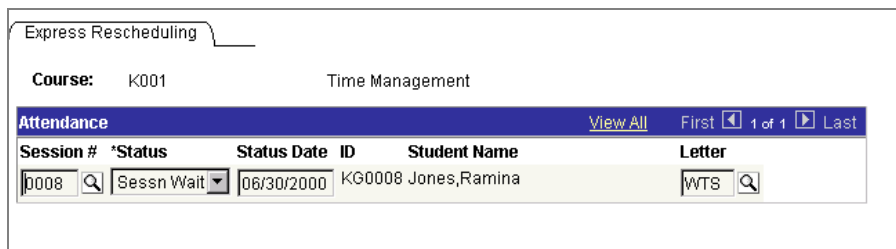
Use Express Rescheduling to review and update information about all students who are enrolled in active sessions of a particular course or are on course or session waiting lists. You can move students from one session to another, change their enrollment status, and designate the type of form letter, if any, that you want to send to students.

You'll find Express Rescheduling very helpful when you need to shuffle students from session to session. For example, when openings occur due to student cancellations or other session enrollment changes, you can view all active sessions at the same time and easily spot session slots to which you can move students.

Although you can change student status, to avoid enrollment confusion, you can't add or remove students using this page.

Express Rescheduling Page

Usage	Use the Express Rescheduling page to move students between course sessions.
Object Name	COURSE_RESCHEDULE
Navigation	<ul style="list-style-type: none"> Develop Workforce, Administer Training (GBL), Use, Express Rescheduling, Express Rescheduling Develop Workforce, Administer Training (USF), Use, Express Rescheduling, Express Rescheduling
Prerequisites	You must create course sessions on the Course Session Table before you can use this page to adjust enrollments.
Access Requirements	Enter a Course code.



Express Rescheduling page

The system displays the **Course** you selected. This field is for information only.

Attendance

The **Attendance** group box lists all students who are on waiting lists or enrolled in active sessions of this course. If the student is enrolled or waitlisted for a course session, the system completes

the **Session #** (session number) field and the corresponding **Letter** code. For all students, the system displays the **Status, Status Date, ID** (employee ID), and **Student Name**.

To enroll a student in a session, select the **Session #** and a **Status** of *Enrolled*. The system issues a warning message if the number of enrolled students in the session exceeds the maximum number allowed.

Rescheduling options include removing students from sessions, changing their status, and changing their session numbers. On this page, you can select a status of *Enrolled, Crse Wait* (course waitlist), or *Sessn Wait* (session waitlist) for a student.

When you select a different status for a student, the system updates the **Status Date**, which you can change if necessary. The **Letter** code may also change according to the status you select. The next time you generate training letters, the system creates a letter of the type defined by the **Letter** code.



For more information about generating form letters for Training Administration, see [Generating Administer Training Letters](#).

CHAPTER 8

Tracking Student Training

Tracking student training enables you to make sure that employees get the skills they need to fulfill job requirements and achieve career objectives. With PeopleSoft Human Resources, you can follow student progress in company-run and external courses for both employees and non-employees, such as contractors or temporary workers.

To help you place students into the right courses and in the right order, you can view summary training data online. For a clear picture of all aspects of employee training and development, you can review and update training-related employee data, such as education and certifications.

Before You Begin

When you track student training, you might also want to review and update employee data that is related to training, such as tests that employees have passed and their educational background. You can define codes that standardize this information and thereby speed up data entry later.

If you want to use these features, you need to set up some or all of these tables:

- **Competency Table.** Use the Competency Table to organize and group competencies.
- **License/Certification Table.** Use the License/Certification Table to define the licenses or certificates that are required to teach the course or achieved by completing the course.
- **Language Table.** If you want to track your employees' and non-employees' language skills, set up language codes in the Language Table.
- **Major Table.** Use this table to identify areas of study.
- **Test Table.** Use the Test Table to track the standard tests that you administer to job applicants or employees who are applying for positions within your organization, such as typing, programming aptitude, or mathematical tests. You can include a test code as an instructor requirement.
- **Membership Table.** If instructors need to belong to professional organizations or other associations to teach specific courses, you need to add these membership codes to the Membership Table.

Federal users must set up the following table:

- **Degree Table.** Use the Degree Table to identify the degree types and years of study that are associated with those degrees.

If you want to use PeopleSoft Human Resources to track courses at schools and colleges, you have the option to create codes in the School Table.

You can access these tables from the Administer Training menu. They are the same tables that you access from the Manage Competencies menu.



For more information about these tables, see *Setting Up Competencies and Accomplishments*.

Accessing Student Data

You open the Student Training, Student Training Summary and Tuition Reimbursement pages to retrieve, view, and update data only for those people (students) who have taken training courses or have other training data in the system. Except for those who are about to become new students, other people in PeopleSoft Human Resources aren't relevant to the Administer Training Business Process. Therefore, the search records for these pages are set up to search only for Student IDs—employees and non-employees who have training data in the system.

When you first open any of the three pages, the system prompts you for an EmplID (employee ID). You can also search by the student's Name, and their Last Name. If you are using Alternate Character functionality in PeopleSoft Human Resources to record Alternate Character Names for employees, you can also enter an AC Name (alternate character name).



For more information about Alternate Character functionality in PeopleSoft HRMS, see *Working With Double-Byte Characters*.

Maintaining Student Training Data

You can use the Student Training page to see an employee's training history including courses that students take outside of your organization, courses taken in-house, or training that employees received before joining your enterprise. To fulfill training requirements, some students will take classes at locations outside your organization, such as courses at local colleges or seminars at trade associations. Use the Student Training page to enter courses that students are attending or have completed for which you don't administer sessions in-house. You can also review any course sessions that are administered in-house that students have taken or are due to take and enroll the students on the spot, as necessary. You can also use the Student Training page to track course results for both employees and non-employees.

You'll also find it helpful to track courses that employees took before joining your organization. When you review the Student Training Summary pages used in various functions of PeopleSoft Human Resources, all users will see an accurate and complete history of the training of any employee. Historical training information might have been entered in the Student Training record during the recruitment process or when the person was hired, so at this point, you can review it and make any needed adjustments. If the information wasn't added in earlier, you can do so now.

For courses with sessions administered in-house, when you put students on waiting lists and enroll them in sessions, the system automatically adds and updates data rows in Student Training. You can then review and update information, as necessary.

To enroll or waitlist students in training course sessions, use the Course Waiting List or Course Session Enrollment pages. When students have completed sessions, you can enter course grades for them on this page.



If you're working with training budgets for your organization, you can use the Student Training - Demand From Budget Training Page to specify how outside courses should be billed to a Business Unit and Department in your organization. If you're reviewing a course on the Student Training pages for a course that the employee took in-house, the system defaults in the budget information that you specified in the Bill to Dept. group box on the Course Session Enrollment page (COURSE_ENROLLMENT).

Student Training - Course Student Enrollment Page

Usage	Use the Student Training - Course Student Enrollment page to review or enter student and course information.
Object Name	COURSE_STUDNT_ENRL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Student Training, Course Student Enrollment • Develop Workforce, Administer Training (USF), Use, Student Training, Course Student Enrollment • Develop Workforce, Manage Competencies (GBL), Use, Training, Training History • Develop Workforce, Manage Competencies (USF), Use, Student Training, Course Student Enrollment
Prerequisites	None
Access Requirements	Enter an Employee ID

Course Student Enrollment		Demand from Budget Training	
Course Information View All First 1 of 1 Last			
Harris,Edward		EmpID: L00007 + -	
Course Code:	k001	Course Title:	Time Management
*Internal/External:	Internal	Facility:	Canadian Headquarters
Session #:	0007	Language:	French
Start Date:	15/11/2000	Min:	5
End Date:	18/11/2000	Max:	10
		# Enrolled:	0
		# Waiting:	0
		Start Time:	09:00
		End Time:	18:00
<input checked="" type="checkbox"/> Training Request Required Training Request Data 			
Student Information			
<input type="checkbox"/> Prerequisites Met		Date Needed:	
*Attendance:	Session Waitlist	Status Date:	30/08/2000
Training Reason:		Waitlist Dt:	30/08/2000
Business Unit:	FEDBT Telecom	Department:	L1102 E&L Rel
Grade:		Letter Code:	
		Letter Dt:	

Student Training - Course Student Enrollment page

The system displays the training history for the selected employee or non-employee, including courses that the course sessions administered in-house: those for which the student is on a session waiting list, enrolled in, or has completed.

Course Information

For course sessions administered in-house, the system populates the data from the Course Session Table and the Course Session Enrollment page and makes some fields unavailable for entry.

To enroll the student in a course you don't administer in-house, insert a new row and enter the following information:

Course Code

If the course session is administered in-house, the system displays the **Course Code**.

If you're adding information about a course not administered in-house, select the **Course Code** if the course is in your Course Table. Otherwise, leave the field blank and enter the course name in **Course Title**.

Course Title

If the course session is administered in-house, the system displays the **Course Title** from the Course Session Table.

If the course isn't in your Course Table, enter the course name in **Course Title**.

Internal/External

The system populates this field if you entered a **Course Code**. If the course isn't in your Course Table, select a course type of **Internal** or **External**.

Facility	The system populates the Facility from the Course Session Table. This field only applies to course sessions that are administered in-house.
Language	The system populates the Language from the Course Session Table. This field only applies to course sessions that are administered in-house.
Session # (session number)	The system displays the Session # . This field only applies to course sessions that are administered in-house.
Min (minimum students)	The system displays the minimum number of students that are allowed for the course session. This field only applies to course sessions that are administered in-house.
Max (maximum students)	The system displays the maximum number of students that are allowed for the course session. This field only applies to course sessions that are administered in-house.
# Enrolled	The system displays the number of students that are enrolled in the course session. This field only applies to course sessions that are administered in-house.
# Waiting	The system displays the number of students on the session waiting list. This field only applies to course sessions that are administered in-house.
Start Date	The system populates the date that the course session starts from the Course Session Table. Enter a Start Date if the course session isn't administered in-house.
End Date	The system populates the date that the course session finishes from the Course Session Table. Enter an End Date if the course session isn't administered in-house.
Start Time	The system populates the time that the course session starts from the Course Session Table. This field only applies to course sessions that are administered in-house.
End Time	The system populates the time that the course session ends each day from the Course Session Table. This field only applies to course sessions that are administered in-house.
Letter Code	The system displays the Letter Code for the student from the Course Session Enrollment page. This field only applies to course sessions that are administered in-house.
Letter Dt (letter date)	If you have printed the administer training letter with the code specified in Letter Code , the system displays the date that the letter was printed. This field only applies to course sessions that are administered in-house.

USF - Training Request Data

The following elements are used for entering and printing training requests and only appear if you are a US Federal user.

Enter a training request to request a training session and to track the student training processes. Such processes include accessing student data, maintaining student training data, viewing training summary information, tracking student tuition reimbursement, and reviewing training-related employee data. You must set the Enrollment/Attendance field to *Request* if you want to process training requests.

Training Request Required If you want to process training request information for an employee, select the **Training Request Required** check box. When you select the check box, the system displays the **Training Request Data** button and the **Print SF182** button.

Training Request Data Click the **Training Request Data** button to display the USF - Employee Training Request Data Page.



Click the **Print SF182** button to print the Training Request Form (SF-182). The form is printed after you have completed and saved the request information.

Student Information

For course sessions administered in-house, the system populates the data from the Course Session Table and makes some fields unavailable for entry.

Prerequisites Met Select the **Prerequisites Met** check box to indicate that an employee or non-employee has met the required prerequisites or training before enrolling in a course that has specific requirements. You define course prerequisites on the Course Table - Prereqs, Goals Page.

Date Needed Enter the date when the student should have completed this course.

Attendance

The system displays the student's **Attendance** status if the course session is administered in-house. Changing the status may affect session enrollments, so you'll probably need to go back to Course Session Enrollment to make other adjustments, such as moving another student from the waiting list into the course. You can update the status of enrolled students to **Completed** here or in Course Session Enrollment.

If the course isn't administered in-house, select an **Attendance** status for the student. The values that you'll use most often are **Currently Attending** and **Completed**.

If this training course is also in the employee career plan, once the status is **Completed**, the **Start Date** of the course appears in the Actual Completion Date field on the Career Plan - Career Training Plan Page.

For more information about career planning, see Planning Careers and Successions, "Planning Careers".

Status Date

The **Status Date** defaults to the system date and changes the date, if necessary

Training Reason

Select a **Training Reason** from the list of available options.

Waitlist Dt (waitlist date)

If the student's Status is set to Crse Wait (course wait), the system displays the **Waitlist Dt**. This field only applies to courses that are administered in-house.

Business Unit

If the course is administered in-house, the system populates **Business Unit** and **Department** from the Course Session Enrollment page.

If you're adding information about a course that is administered outside of your organization and that wouldn't be administered using the Course Session Enrollment page, or if you are entering new course information here regardless of whether or not it is administered in-house, then the system populates an employee's **Business Unit** and **Department** from the employee's job data record. If the student is a non-employee, the non-employee's business unit information comes from the information that you entered in the Add Non-Employee component.

If the training is billed to a different business unit, select the **Business Unit** from the list of available options.

Note. You'll also link the course to a Budget Training Demand ID for budget processing purposes on the Demand from Budget Training page in the Student Training component.

Department

If the training is billed to a different department, select the **Department** from the list of available options.

Grade

If the student has completed the course, enter a Course **Grade**.

Student Training - Demand From Budget Training Page

Usage	Use the Demand from Budget Training page to specify how a course that a student has completed or is enrolled in should be billed to a Business Unit and Department in your organization. You already specified a Business Unit and Department information for billing. Now, you will link the student course information to a specific Demand ID in your budget training plan. You make this link so that the system can process training costs against your training budget. If the student is taking or has completed an outside training course, then you can enter information for how that course should be tracked as part of a Demand ID, as well.
Object Name	COURSE_STUDNT_ENR2
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Student Training, Demand from Budget Training • Develop Workforce, Administer Training (USF), Use, Student

	<p>Training, Demand from Budget Training</p> <ul style="list-style-type: none"> • Develop Workforce, Manage Competencies (USF), Use, Student Training, Demand from Budget Training
Prerequisites	Enter Employees.
Access Requirements	Enter an Employee ID.

Student Training - Demand from Budget Training page

The system displays the employee name and the **EmpID** (employee ID) for your information so that you can easily verify that you're entering billing information for the correct student. You can also see the courses to which the student is assigned on the Student Training page. The system displays the Course ID, Description, **Session #** (session number), and the session **Start Date** and **End Date**.

Demand from Budget Training

In the **Demand from Budget Training** group box, you can link enrollments with a training demand (requirements) that you defined in the Budget Training business process. Making this link enables the system to compute the ratio between the costs that you've planned for in your Budget Training module and the actual costs incurred for training that you track in the Administer Training module.

To locate the right **Demand ID**, you can enter three varieties of **Search Criteria**. If you select the **Population** check box, the system searches only for demands that match the employee's Department, Job Code, and Competencies. If you select the **Catalog** check box, the system searches for demands that match the **Course Code** selected. If you select both **Population** and **Catalog**, the system searches for all the possibilities together.



For more information about the budget training process and how to work with Training Demands, see Determining Training Demands for Your Organization.

France

For French companies only, you'll define additional enrollment information required for the French Training Report 2483. This group box is for users of the PeopleSoft Human Resources commercial application. The system doesn't display the **France** group box if you're a US Federal user.

Training Leave

Select the **Training Leave** check box if the training course is to be taken during an employee's leave.

Part Time Course

Select the **Part Time Course** check box if you're enrolling the employee on a sandwich course, whereby the employee gains work experience while studying.

Time Spent at Training

If you selected the **Part Time Course** check box, enter the amount of time spent training and select the unit in which the time is recorded, either *Hour* or *Day*. You can only complete **Time Spent at Training** if the student has a status of Incomplete.

Student Training Summary Page

Usage	<p>Use the Student Training Summary page to get an overview of student training and determine at a glance whether students are receiving adequate training to perform their current job. You'll find summary information especially helpful when you need to determine if students have taken all course prerequisites.</p> <p>Training summary information is also useful for career and succession planning. Besides tracking current job training requirements, you can help employees prepare for the next job they're slated to assume or determine succession candidate training qualifications instantly.</p>
Object Name	TRN_STUDNT_CRS_SUM
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Inquire, Student Training Summary, Student Training Summary • Develop Workforce, Plan Careers, Inquire, Training Summary, Training Summary • Develop Workforce, Plan Successions (GBL), Inquire, Training Summary, Training Summary • Develop Workforce, Plan Successions (USF), Inquire, Training Summary, Training Summary
Prerequisites	None
Access Requirements	Enter an Employee ID.

Student Training Summary				
Santos, Antonio			EmpID: KU0010	
Training Summary				
View All First 1-3 of 3 Last				
Session	Status			
Course	Title	Session #	Start Date	End Date
K007	Effective Interviewing	0002	18/11/1999	18/11/1999
K013	PeopleSoft HRMS	0001	16/06/1999	17/06/1999
K012	Project Management	0002	17/05/1999	25/05/1999

Student Training Summary: Session page

Training Summary				
View All First 1-3 of 3 Last				
Session	Status			
Course	Title	Session #	Status	Grade
K007	Effective Interviewing	0002	Completed	P
K013	PeopleSoft HRMS	0001	Completed	P
K012	Project Management	0002	Completed	P

Student Training Summary: Status page

All the data displayed on this page defaults from the student’s training records. This data is for information only and covers the following:

EmpID (employee ID), **Course, Title** of the course, **Session #** (session number) attended, **Start Date** and **End Date** of the session, and student’s **Status**. If the student has completed the course, the system also displays the **Grade** achieved.

The system includes all courses not administered in-house that the student is currently attending.

USF - Tracking Training Requests

This section is for US Federal users only to track training requests according to US Federal requirements.

When you request training, you assign a status to the request, and the system routes it to authorizing and approving officials according to your agency’s requirements. After reviews and approvals, the system automatically enrolls or waitlists students.

To request training, use the Course Session Enrollment Page. To directly enroll or waitlist students in training course sessions, use the Course Wait List Page or Course Session Enrollment pages. When students have *completed* sessions, you can enter course grades for them on this page.

To review and print an employee’s training request information, use the USF - Student Course Enrollment Page or the Student Training - Course Student Enrollment Page.

USF - Student Course Enrollment Page

Usage	Use the USF- Student Course Enrollment page to track and review the courses that an individual student has requested.
Object Name	CRSE_ENRL_WL
Navigation	Develop Workforce, Administer Training (USF), Use, Student Course Enrollment, Course Session Enrollment
Prerequisites	Establish courses.
Access Requirements	Enter an Employee ID.

Course Session Enrollment

ID: L00001 Rodriguez, Anna Lucia

*Course	Description	*Session #	Start Date	*Attendance	Trn Request	Trn Request
1 K001	Time Management	0001	01/03/1999	Completed	<input checked="" type="checkbox"/>	Trn Request + -
2 K003	Performance Management	0001	03/05/1999	Completed	<input type="checkbox"/>	+ -

Student Course Enrollment - Course Session Enrollment page

This page lists the courses that this person has requested.

To add a course, insert a row and enter the **Course**, **Session #** (session number), and **Attendance** status.

To process training request information for an employee or non-employee, select the **Trn Request** check box. When you select this check box, the system displays the **Trn Request** button and the **Print SF182** button.

Click the **Print SF182** button to print the Training Request Form. The form is printed after you have completed and saved the request information.

Click the **Trn Request Data** button to view the USF - Employee Training Request Data Page where you can view the training request information.

Reviewing Training-Related Employee Data

As you administer training programs, you may want to review and update other employee training-related information, such as education, competencies and languages, and the results of tests. You'll find several pages in the Administer Training menu that you can use for tracking all the additional information that you need for employees and non-employees.

You can review and update training-related employee data in the following pages:

- Competencies

- Education
 - Licenses/Certifications
 - Memberships
 - Languages
 - Test Results
-



The Education page is for users of the PeopleSoft commercial application only and doesn't appear in the menu for US Federal users.

These pages also appear in the Manage Competencies menu.



For more information about these pages, see Tracking Worker Competencies and Accomplishments.

Tracking Training Costs

With PeopleSoft Human Resources, you can handle student reimbursements for external course expenses—the system automatically calculates reimbursable amounts according to the schedules you create. If you are working with the Budget Training module, you can also run processes that update your organization's training costs, as students complete courses and are reimbursed for expenses for training, and posts these actual costs against your organization's training budget.

Setting Up and Entering Reimbursed Tuition Expenses

If your organization reimburses employees for training-related expenses, use these pages to define the expenses that are reimbursed and to track the expenses that are reimbursed:

- **Tuition Expense Type Table Page.** This is where you define the types of expenses that your organization reimburses. For each expense type, you can also define the percentage that is reimbursed and set up a reimbursable limit.
- **Tuition Reimbursement Page** Enter the expenses claimed by students. You can track reimbursements for both external and internal courses.



The reimbursement information that you track here is for informational purposes only and does not impact payroll processing in the PeopleSoft human resources management system (HRMS).

Tuition Expense Type Table Page

Usage	Use the Tuition Expense Type Table page to classify reimbursable training expenses and designate the percentage that are reimbursable. You can track all the expense types for which you usually reimburse students, including tuition, textbooks, and ancillary materials. You'll find this especially helpful for courses that students take that are outside of your organization, such as courses at a local college.
Object Name	TRN_EXPNS_TYP_GBL
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup, Tuition Expense Type Table, Tuition Expense Type Table

	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (USF), Setup, Tuition Expense Type Table, Trn Expns Typ Gbl • Develop Workforce, Budget Training (GBL), Setup, Tuition Expense Type Table, Tuition Expense Type Table
Prerequisites	None.
Access Requirements	Enter the Tuition Expense Type.

Tuition Expense Type Table page

The system displays the Tuition Expense Type you selected. This field is for information only.

Effective Date The **Effective Date** defaults to the system date, usually today’s date, which you’ll change, unless you want the training expense type to go into effect today.

Description Enter a **Description** of the expense type.

Short Description Enter a **Short Description** of the expense type.

Status The expense type **Status** will default to *Active*.

USF - Federal

The following button appears only if you are US Federal user.

Federal Data

Click the **Federal Data** button to access the USF - Cost Type Page, where you specify whether the **Tuition Expense Type** you selected is a direct or indirect cost.

France

For French companies only, you'll define additional expense data for the 2483 report requirements. This group box does not appear if you are a US Federal user.

2483 Type

Select a **2483 Type** that indicates the expense type. Valid options include *Equipment, Furniture, Instructor, Lodging*, and *Non-Instruct* (non-instructor-related expenses).

Chargeable

Select the **Chargeable** check box if the amounts entered for this expense type are chargeable and can be reported on the 2483 Training report.

Limited Amount

Select the **Limited Amount** check box if the expense amount is restricted to a specific value. When you select this check box, the system makes the **Limit Amount** and **Cost Unit** fields available for entry.

Limit Amount

Enter the **Limit Amount** in this field and the associated unit in the **Cost Unit** field.

For example, if you want to limit hotel lodging to 2000 FRF (French francs) per person, per day, enter **2000** in the **Limit Amount** field, and select *Pers/Day* in the **Cost Unit** field.

Cost Unit

Select the **Cost Unit** for the **Limit Amount**.



For more information about the French 2483 legal reporting requirement, see Producing the French Training Report 2483.

Percent Reimbursable**Work Related Course**

Enter the percentage of the expense that is reimbursable if the course is work-related.

Non-Work-Related Course

Enter the percentage of the expense that is reimbursable if the course is not work-related.

Reimbursable Limit

To help your organization track tuition reimbursement costs, you can define reimbursable limits in the **Reimbursable Limit** group box.

Limited Reimbursement

Select the **Limited Reimbursement** check box if you want to limit the amount that students are reimbursed.

When you select this check box, the system makes the **Reimbursable Limit Amount** and **Cost Unit** fields available for entry.

Reimbursable Limit Amount

Enter the reimbursable limit in this field and the associated unit in **Cost Unit**.

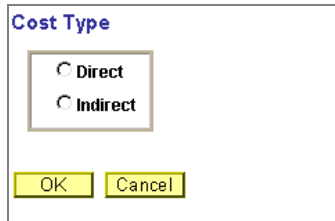
For example, you can specify a flat cost, such as \$100, or you can limit the amount reimbursed for a period, such as \$100 per person, per year.

Cost Unit

Select the **Cost Unit** for the **Reimbursable Limit Amount**.

USF - Cost Type Page

Usage	Use the USF - Cost Type page to specify whether the tuition expense type that you selected is a direct or indirect cost.
Object Name	GVT_TUIT_EXPEN_SEC
Navigation	To access the page, click the Federal Data button on the Tuition Expense Type page.



USF - Cost Type page

Select one of these two cost types: **Direct** or **Indirect**.

Tuition Reimbursement Page

Usage	Use the Tuition Reimbursement page to track expenses that are reimbursed to students. You can enter and update tuition reimbursements only for courses where students have a status of <i>Enrolled</i> , <i>Currently Attending</i> , or <i>Completed</i> . You update (or the system updates) the student status in Course Session Enrollment and Student Training.
Object Name	TRN_TUITION_REIMB
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Tuition

	<p>Reimbursement, Tuition Reimbursement</p> <ul style="list-style-type: none"> • Develop Workforce, Administer Training (USF), Use, Tuition Reimbursement, Tuition Reimbursement
Prerequisites	Before you can enter expenses, you must define the types of expenses that are reimbursed on the Tuition Expense Type Table Page.
Access Requirements	Enter the Employee ID, Course Code, and Session Number.

Tuition Reimbursement

Justin,Clare **EmplID:** K0G008

Course: K012 Project Management **Session #:** 0001

Start/End Date: 15/02/1999 23/02/1999

Totals		
230.00	230.00	USD

Expense		View All	First	1 of 1	Last
Date	Amount				
*Expense Type	Reimb Date				
K08EXPN Travel	30/08/2000				

Tuition Reimbursement: Date page



Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

Common Page Information

The system displays the **EmplID** (employee ID), **Course**, **Session #** (session number), and **Start/End Date** of the course session.

Totals

The **Totals** group box shows you the sum of the amounts in the Expense Amount field, the sum of Amount Reimbursed, and the currency code. These fields are for information only.

Date Tab

See the previous screen shot for a view of this tab.

Expense Type

Select an **Expense Type** from the expenses types that you created in the Tuition Expense Type Table Page. When you move out of this field, the system displays a description of the expense.

Reimb Date (reimbursement date)

Enter a reimbursement date.

Amount Tab

Expense					
Date		Amount			
Expense Type	Expense Amount	Work Rltd	Amount Reimbursed	Currency Code	
K08EXPN	230.00	<input checked="" type="checkbox"/>	230.00	USD	

Tuition Reimbursement: Amount page

Expense Amount

Enter the expense amount.

Work Rltd (work related)

Select the **Work Rltd** check box if the course is work-related.

The system calculates the amount reimbursed to the student, based on the percentages that you enter on the Tuition Expense Type Table. You can set up different percentages for work-related and non-work-related courses. If you have set a reimbursement limit on the Tuition Expense Type table, when you select this check box, the system calculates the amount reimbursed. If the limit is exceeded, the system displays a warning message and adjusts the **Amount Reimbursed**.

Amount Reimbursed

The system calculates the amount reimbursed to the student, based on the percentages that you defined on the Tuition Expense Type Table.

If you set a reimbursable limit, the system checks whether the limit has been exceeded. If the limit is exceeded, the system displays a warning message and reduces the **Amount Reimbursed** according to the limit that you set. You can continue with the reduced amount or update the **Amount Reimbursed**.

Currency Code

The **Currency Code** defaults to the base currency that your organization uses, which is specified in the Installation Table. If you're entering expenses for a course that is reimbursable in another currency, select the appropriate code from the valid values in the Currency Code Table.



For more information about how the system determines default currency and performs currency conversions, see [Setting Up the Training Cost Currency](#).

Calculating and Tracking Student Costs

You run the Compute Student Costs Process to calculate student costs for a particular course session. This process splits out all the training costs to the employee level using cost information that is specified at the course catalog, course, and course session level.

Once you've run the Student Costs Process, you can view the results in the Track Student Cost component. Any adjustments you make to the cost information here override the cost information that is calculated by the Compute Student Costs Process.

The Track Student Costs component has a page for each type of cost that is associated with student training—salary, vendor, equipment, instructor, employee expense, and course session expense. Use these pages to specify costs on an employee level. You'll review and manage this information for each course session that an employee completes.

The process calculates the training cost for each employee in the specified session, for the specified Budget Period, and populates the tables that store employee training cost component information, as follows:

Training Cost Component	Stored on This Table
Salary Cost	TRN_EESAL_COST
Vendor	TRN_EEPROV_COST
Facility	TRN_EEFACIL_COST
Equipment	TRN_EEEQUIP_COST
Instructor	TRN_EEINST_COST
Employee Expense	TRN_EEEXPN_COST
Session Expense	TRN_SSEXPN_COST



For more information about how the system calculates costs, based on the course session costs and the different calculation formulas applied to each cost unit type, see [Creating Global Scenarios](#).

To review the results of the Compute Student Cost process, use the Track Student Costs component. In this component, you review the student costs for course sessions, broken out by salary, vendor, facility, equipment, instructor, and employee and session expenses. While the system populates these amounts for you automatically, using the Compute Student Cost process, you can overwrite any of the component costs and make any necessary adjustments to the costs. If you manually update the cost component results on the Track Student Cost page, you can specify that the system preserve your manual edits, if you rerun the Compute Student Costs process.

When you run the Update Planned and Real Costs process to update your training budget for a Budget Period with your actual training costs for the Budget Period that you've tracked in the

Administer Training module, the system uses the cost amounts that you've specified on the Track Student Cost pages to update your budgets.

Compute Student Costs Page

Usage	<p>Use the Compute Student Costs page to run the Compute Student Costs process. You must run this process before you can review or update your actual training costs at the employee level, using the Track Student Cost pages.</p> <p>This process computes student costs by Budget Period for the course sessions that you specify as part of your process parameters. Once you've run the process, you can view your results in the Track Student Cost pages for the employees who received training during that Budget Period for the specified courses.</p>
Object Name	RUNCTL_TRN013
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Process, Compute Student Cost, Compute Student Cost • Develop Workforce, Administer Training (USF), Process, Compute Student Cost, Compute Student Cost
Prerequisites	<p>Before you can use the Student Cost Process, you need to establish your training budget, the costs associated with Course Sessions, and define training demands.</p>
Access Requirements	<p>Enter the Run Control ID.</p>

Compute Student Cost

Run Control ID: 12 [Report Manager](#) [Process Monitor](#)

Report Request Parameters:

Budget Period: 1999 Training Budget Period

From Date: 01/01/1999 **Thru Date:** 31/12/1999 Cancelled Completed Incomplete
 No Show Enrolled Dropped

Course Information View All First 1 of 1 Last

*Course Code	*Session #	Last Proc Dt	Split	Override	
<input type="text" value="K001"/>	<input type="text" value="0003"/> Time Management		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Compute Student Cost page

The system displays the **Run Control ID** that you selected. This field is for information only.

Budget Period	Select the Budget Period from the list of valid values. When you move out of the field, the system displays the description of the Budget Period .
From Date	When you select a budget period, the system defaults the From Date from the Budget Period Table Page. This field is for information only.
Thru Date	When you select a budget period, the system defaults the Thru Date from the Budget Period Table Page. This field is for information only.
Cancelled	Select the Cancelled check box if you want to include students who are associated with the specified courses and course session and who have an attendance status of <i>Cancelled</i> .
Completed	Select the Completed check box if you want to include students who are associated with the specified courses and course session and who have an attendance status of <i>Completed</i> .
Incomplete	Select the Incomplete check box if you want to include students who are associated with the specified courses and course session and who have an attendance status of <i>Incomplete</i> .
No Show	Select the No Show check box if you want to include students who are associated with the specified courses and course session and who have an attendance status of <i>No Show</i> (the student didn't attend the course).
Enrolled	Select the Enrolled check box if you want to include students who are associated with the specified courses and course session and who have an attendance status of <i>Enrolled</i> .
Dropped	Select the Dropped check box if you want to include students who are associated with the specified courses and course session and who have an attendance status of <i>Dropped</i> .
Course Information	
Course Code	Select the Course Code from the list of valid courses. The system displays only the courses that have completed sessions for the selected budget period.
Session # (session number)	Select the Session # from the list of completed sessions.

Last Proc Dt (last process date)

Last Proc Dt shows the date that you last ran the Compute Student Cost process for the course session and budget period specified. This field is for information only.

Split

Select the **Split** check box if you want to proceed with the process and populate the Track Student Cost pages with the process calculation results.

Override

Select the **Override** check box to replace data manually input on the Track Student Cost pages.

On the Facility, Equipment, Instructor, and Session Expense Track Student Cost pages, you have the option to select the data **Override** check box to enter student-level cost information that overrides any other defaults. If you select the **Override** check box on this process page, the system replaces the data with new cost information, if you subsequently rerun the Compute Student Cost process. If you do not select the **Override** check box, the Compute Student Costs process preserves any data on the Track Student Cost pages where you selected the **Override** check box.

Click **Run** to run this request. Process Scheduler runs the Compute Student Costs process at user-defined intervals.



For more information about setting up your Budget Training process and tracking your training costs, see Setting Up Training Costs. To learn more about defining training Demands and creating a training budget, see Defining Training Requirements. For more information about the Process Scheduler, see Process Scheduler.

Track Student Costs - Salary Page

Usage	Use the Track Student Costs - Salary page to review the employee salary costs that are associated with a Course Session and Budget Period based on the Employee Training Cost Table or the Job Code Training Cost Table. The page displays the salary amount that resulted from the Compute Course Cost process for this employee, course session, and budget period.
Object Name	TRN_EE_SESSN_CST1
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Salary • Develop Workforce, Administer Training (USF), Use, Track Student Costs, Salary

Prerequisites	Establish employees, courses and costs.
Access Requirements	Enter the Employee ID, Course, and Session Number.

Track Student Costs - Salary page

The system displays the **Per Employee Cost**, in the appropriate currency, for this employee. The system also indicates the **Business Unit** and **Department** code to be charged for this salary cost, when you run the Update Planned and Real Cost process for this budget period. The amount that you see here is based first on Course Session Cost information. If there is no information on the Course Session Cost Table, then the amount is based on the student's Course Session Enrollment information.

You can override the salary amount here if it is necessary to make an adjustment to the system calculated salary cost for this employee, for this course.



For more information about running the Compute Student Cost process, see Calculating and Tracking Student Costs.

France

For French companies only, you'll define additional salary information to be tracked.

Enter the **Financed Cost** if the student training is being financed by an external organization and the **Financing Fund** that the **Financing Department** used to finance the student's training costs.



You enter this information to generate the French Training Report 2483.



For more information about generating Report 2483, see Producing the French Training Report 2483.

Track Student Costs - Vendor Page

Usage	Use the Track Student Costs - Vendor page to review and update the vendor costs that resulted from the Compute Course Cost process for this employee, course session, and budget period.
Object Name	TRN_EE_SESSN_CST3
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Vendor • Develop Workforce, Administer Training (USF), Use, Track Student Costs, Vendor
Prerequisites	Establish the course sessions and costs.
Access Requirements	Enter the Employee ID, Course, and Session Number.

Track Student Costs - Vendor page

The system displays the **Vendor ID** that is associated with this course session on the Course Session Table and the Vendor Description. The system also displays the Compute Student Costs process calculated **Per Employee Cost** in the corresponding currency, as well as the **Business Unit** and **Department** code to be charged. These fields are unavailable for data entry when you first enter the page. The amount that you see here is based first on Course Session Cost

information. If there is no information on the Course Session Cost Table, then the amount is based on the student's Course Session Enrollment information.



For more information about how the system determines the default currency for employees and performs currency conversions, see *Setting Up the Training Cost Currency*.

To make any manual changes to the vendor costs that are associated with this student for this course session, select the **Data Override** check box. The system makes the fields available for entry, and you can make any edits necessary to adjust the vendor cost.



If you choose to override data here, and you rerun the Compute Student Cost process with the Compute Student Cost Override check box selected, the system will overwrite the information here with new calculation results.



Once you make any changes to the default values on the page, you cannot select the **Data Override** check box again.

France

For French companies only, you'll define additional vendor information to be tracked for your legal reporting.

Enter the **Financed Cost** if the student training is being financed by an external organization, and indicate the **Financing Fund**. You track external Financing Funds for French Training programs using the Vendor Table.

Select the **Financing Department** to receive the funds.

For your legal reports, select the **Certified**, **Billed**, or **Chargeable** check boxes, if applicable. In the **Date Entered** field, enter the invoice was entered for the vendor.

Enter the **Agreement Date** and the **Company** that signed the agreement.



You enter this information to generate the French Training Report 2483.



For more information about generating Report 2483, see *Producing the French Training Report 2483*.

Track Student Costs - Facility Page

Usage	Use the Track Student Costs - Facility page to review and update the facility costs that resulted from the Compute Course Cost process for the selected employee, course session, and budget period.
Object Name	TRN_EE_SESSN_CST5
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Facility • Develop Workforce, Administer Training (USF), Use, Track Student Costs, Facility
Prerequisites	You must run the Compute Student Costs process to update costs before you use this page.
Access Requirements	Enter the Employee ID, Course, and Session Number.

The screenshot shows the 'Track Student Costs - Facility' page. At the top, there are tabs for 'Salary', 'Vendor', 'Facility', 'Equipment', 'Instructor', 'Employee Expense', and 'Session Expense'. The 'Facility' tab is selected. The page displays the following information:

- Employee:** Santos, Antonio (EmpID: KU0010)
- Course:** K007 Effective Interviewing (Session #: 0002)
- Start/End Date:** 18/11/1999

Below this information is a 'Facility' section with a table for inputting costs. The table has columns for Vendor, Facility, Location, Room Code, Per Employee Cost, Business Unit, Department, and Data Override. A dropdown menu is open for 'France', showing fields for Financed Cost, Financing Fund, and Financing Department.

Track Student Costs - Facility page

The system displays the **EmpID** (employee ID), the **Course**, the **Session #** (session number) that you entered, and the **Start/End Date** of the session. These fields are for information only.

Facility

Vendor

The system displays the **Vendor ID** that is associated with this course session on the Course Session Table - Course Session Profile Page.

Facility

The system displays the **Facility** that is associated with this course session on the Course Session Table - Location, Instructor Page.

Location	The system displays the Location description.
Room Code	The system displays the Room Code for the room where the course session took place.
Per Employee Cost	<p>The system displays the facility costs per employee that were calculated by the Compute Student Costs process. The currency is shown next to the Per Employee Cost field. The amount is based first on Course Session Cost information. If there is no information on the Course Session Cost Table, then the amount is based on the student's Course Session Enrollment information.</p> <p>You can override the cost if you select the Data Override check box.</p> <p>Note. Once you make any changes to the default values on the page, the system makes the Data Override check box unavailable for entry.</p>
Business Unit	The system displays the Business Unit that is charged for the facility cost.
Department	The system displays the Department that is charged for the facility cost.
Data Override	Select the Data Override check box if you want to make any manual changes to the facility costs that are associated with this student for this course session. When you select the check box, the system makes all the fields on the page available for entry.



If you choose to override data on this page, and you rerun the Compute Student Cost process with the Compute Student Cost Override check box selected, the system overwrites the data that you entered here with new calculation results.

France

For French companies only, you'll define additional facility information that is used to generate the French Training Report 2483.

Financed Cost Enter the **Financed Cost** if the student training is being financed by an external organization.

Financing Fund Select the **Financing Fund** that the **Financing Department** uses to finance the student's training costs. Set up financing funds in the Vendor Table.

Financing Department

Select the department that is financing the student training costs from the list of valid department



For more information about generating Report 2483, see Producing the French Training Report 2483.

Track Student Costs - Equipment Page

Usage	Use the Track Student Costs - Equipment page to review or update training equipment and materials costs that resulted from the Compute Course Cost process for this employee, course session, and budget period.
Object Name	TRN_EE_SESSN_CST7
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Equipment • Develop Workforce, Administer Training (USF), Use, Track Student Costs, Equipment
Prerequisites	Establish the employees, courses and costs.
Access Requirements	Enter the Employee ID, Course, and Session Number.

Track Student Costs - Equipment page

The system displays the **Equip Code** (equipment code) for any equipment that is associated with this course session, on the Course Session Table.

The system displays the equipment cost per employee, which was calculated by the Compute Student Costs process, in the **Per Employee Cost** field. The currency is shown next to the **Per Employee Cost** field. The amount that you see here is based first on Course Session Cost information. If there is no information on the Course Session Cost Table, then the amount is based on the student's Course Session Enrollment information.



For more information about how the system determines the default currency for employees and performs currency conversions, see Setting Up the Training Cost Currency.

The system displays the **Business Unit** and **Department** that is charged for the equipment cost.

EE Qty (employee quantity) defines how many units of equipment/materials that the employee used as part of the course session. This information is specified for the Course Session on the Course Session Table and the Course Session Cost Table. These fields are unavailable for data entry when you first enter the page.

To make any manual changes to the equipment costs that are associated with this student for this course session, select the **Data Override** check box. The system makes the fields available for entry, and you can make any edits necessary to adjust the vendor cost.



If you choose to override data here, and you rerun the Compute Student Cost process with the Compute Student Cost Override check box selected, the system will overwrite the information here with new calculation results.



Once you make any changes to the default values on the page, you cannot select the **Data Override** check box again.

France

For French companies only, you'll define additional equipment information.

Enter the **Financed Cost**, if the student training is being financed by an external organization, and the **Financing Fund** that the **Financing Department** used to finance the student's training costs. Select a valid department from the list of departments for this student, based on the business units that are associated with this budgeting period.

You track external Financing Funds for French Training programs using the Vendor Table.



You enter this information to generate the French Training Report 2483.



For more information about generating Report 2483, see Producing the French Training Report 2483.

Track Student Costs - Instructor Page

Usage	Use the Track Student Costs - Instructor page to review and update the training instructor costs that resulted from the Compute Course Cost process for this employee, course session, and budget period.
Object Name	TRN_EE_SESSN_CST4
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Instructor • Develop Workforce, Administer Training (USF), Use, Track Student Costs, Instructor
Prerequisites	Establish the employees, courses, and costs.
Access Requirements	Enter the Employee ID, Course, and Session Number.

Track Student Costs - Instructor page

The system displays the **Instructor ID**, the **Vendor ID**, and the **Vendor Name** for the vendor that is supplying the instructors for this course session, on the Course Session Table.

The system displays the instructor cost per employee, which was calculated by the Compute Student Costs process, in the **Per Employee Cost** field. The currency is shown next to the **Per Employee Cost** field. The amount that you see here is based first on Course Session Cost information. If there is no information on the Course Session Cost Table, then the amount is based on the student's Course Session Enrollment information.



For more information about how the system determines the default currency for employees and performs currency conversions, see *Setting Up the Training Cost Currency*.

The system displays the **Business Unit** and **Department** that is charged for the equipment cost.

The system displays the **Duration**, expressed in the same unit as the cost unit, based on the Course Session Cost Table.



For more information about how the system establishes **Duration** cost units, see *Setting Up Default Training Costs*.

To make any manual changes to the instructor costs that are associated with this student for this course session, select the **Data Override** check box. The system makes the fields available for entry, and you can make any edits necessary to adjust the vendor cost here.



If you choose to override data here, and you rerun the Compute Student Cost process with the Compute Student Cost Override check box selected, the system will overwrite the information here with new calculation results.



Once you make any changes to the default values on the page, you cannot select the **Data Override** check box again.

France

For French companies only, you'll define additional instructor information.

Enter the **Financed Cost**, if the student training is being financed by an external organization, and the **Financing Fund** that the **Financing Department** used to finance the student's training costs. Select a valid department from the list of departments for this student, based on the business units that are associated with this budgeting period.

You track external Financing Funds for French Training programs using the Vendor Table.



You enter this information to generate the French Training Report 2483.



For more information about generating Report 2483, see *Producing the French Training Report 2483*.

Track Student Costs - Employee Expense Page

Usage	Use the Track Student Costs - Employee Expense page to update the employee expense costs that resulted from the Compute Course Cost process for this employee, course session, and budget period.
Object Name	TRN_EE_SESSN_CST2
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Employee Expense • Develop Workforce, Administer Training (USF), Use, Track Student Costs, Employee Expense
Prerequisites	Establish the employees, courses, and costs.
Access Requirements	Enter the Employee ID, Course, and Session Number.

Track Student Costs - Employee Expense page

The system displays the **Expense Type** for the employee costs that are associated with this course session, on the Course Session Table.

The system displays the employee expenses per employee, which was calculated by the Compute Student Costs process, in the **Per Employee Cost** field. The currency is shown next to the **Per Employee Cost** field. The amount that you see here is based first on Course Session Cost information. If there is no information on the Course Session Cost Table, then the amount is based on the student's Course Session Enrollment information.



For more information about how the system determines the default currency for employees and performs currency conversions, see Setting Up the Training Cost Currency.

The system displays the **Business Unit** and **Department** that is charged for the equipment cost.

EE Qty (employee quantity) defines how many units of the Expense Type that the employee used as part of the course session. These fields are unavailable for data entry when you first enter the page.

To make any manual changes to the vendor costs that are associated with this student, for this course session, select the **Data Override** check box. The system makes the fields available for entry, and you can make any edits necessary to adjust the vendor cost here.



If you choose to override data here, and you rerun the Compute Student Cost process, with the Compute Student Cost Override check box selected, the system will overwrite the information here with new calculation results.



Once you make any changes to the default values on the page, you cannot select the **Data Override** check box again.

France

For French companies only, you'll define additional expense type information.

Enter the **Financed Cost**, if the student training is being financed by an external organization, and the **Financing Fund** that the **Financing Department** used to finance the student's training costs. Select a valid department from the list of departments for this student, based on business units that are associated with this budgeting period.

You track external Financing Funds for French Training programs using the Vendor Table.



You enter this information to generate the French Training Report 2483.



For more information about generating Report 2483, see Producing the French Training Report 2483.

Track Student Costs - Session Expense Page

Usage	Use the Track Student Costs - Session Expense page to update the expense costs that resulted from the Compute Course Cost process for this employee, course session, and budget period.
Object Name	TRN_EE_SESSN_CST6
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Session Expense

	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (USF), Use, Track Student Costs, Session Expense
Prerequisites	Establish employees, courses and costs.
Access Requirements	Enter the Employee ID, Course, and Session Number.

Track Student Costs - Session Expense page

The system displays the **Expense Type** for this course session from the Course Session Table.

The system displays the session expenses per employee, which were calculated by the Compute Student Costs process, in the **Per Employee Cost** field. The currency is shown next to the **Per Employee Cost** field. The amount that you see here is based first on Course Session Cost information. If there is no information on the Course Session Cost Table, then the amount is based on the student's Course Session Enrollment information.



For more information about how the system determines the default currency for employees and performs currency conversions, see [Setting Up the Training Cost Currency](#).

The system displays the **Business Unit** and **Department** that is charged for the equipment cost.

EE Qty (employee quantity) defines how many units of the **Expense Type** that the employee used as part of the course session. This information is specified for the Course Session on the Course Session Table and the Course Session Cost Table. These fields are unavailable for data entry when you first enter the page.

To make any manual changes to the session expense costs that are associated with this student for this course session, select the **Data Override** check box. The system makes the fields available for entry, and you can make any edits necessary to adjust the vendor cost here.



If you choose to override data here, and you rerun the Compute Student Cost process with the Compute Student Cost Override check box selected, the system will overwrite the information here with new calculation results.



Once you make any changes to the default values on the page, you cannot select the **Data Override** check box again.

France

For French companies only, you'll define additional expense type information.

Enter the **Financed Cost**, if the student training is being financed by an external organization, and the **Financing Fund** that the **Financing Department** used to finance the student's training costs. Select a valid department from the list of departments for this student, based on business units that are associated with this budgeting period.

You track external Financing Funds for French Training programs using the Vendor Table.



You enter this information to generate the French Training Report 2483.



For more information about generating Report 2483, see Producing the French Training Report 2483.

Running the Update Planned and Real Costs Process

After you run the Compute Student Costs process and review and update the student training cost results on the Track Student Training pages, you can run an additional process that updates all of the realized training costs that you're tracking in the Administer Training business process module. Then you can post these costs against your organization's training budget in the Budget Training module.

Once you run the Update Planned and Real Cost Process, you can examine how you've spent your training budget, using online inquiry pages that detail your budgeted costs for your organization and any unbudgeted costs that you incurred as part of training your employees. Also, you can look at how your organization's total budgeted costs compare to what you spent on training at the end of your budget period, or at any point along the way, to examine how your projected expenditures compare to what you've spent.

Update Planned and Real Costs Page

Usage	Use the Updated Planned and Real Costs page to run the Update Planned and Real Cost process.
Object Name	RUNCTL_TRN012
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Process, Update Planned and Real Cost, Update Planned and Real Cost • Develop Workforce, Administer Training (USF), Process, Update Planned and Real Cost, Update Planned and Real Cost
Prerequisites	You can run this process only if you've set up a training budget, using the Budget Training module, and you've been tracking actual training costs in the Administer Training business process.
Access Requirements	Enter the Run Control ID.

Update Planned and Real Cost

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters:

Budget Period: 1999 Training Budget Period

Business Unit: GBI BU for US004

Base Currency: USD

Update Planned and Real Costs page

The system displays the **Run Control ID** that you specified when you opened the Update Planned and Real Cost run control page.

To run the process, enter a **Budget Period**. You can update costs for any predefined Budget Period, but you'll only want to run the process against the current budget period because you'll need to have recorded actual training costs for the budget period, to obtain meaningful cost results. You can run the process at any time during your current Budget Period, to obtain a point in time look at how your projected training spending compares to your actual expenditures today.



The Budget Period needs to be frozen for the process to execute properly.

Select a valid **Business Unit** for the Budget Period that you selected. You can only select only the business units that are associated with the Budget Period on the Budget Period Table.

When you move out of the **Business Unit** field, the system displays the **Base Currency** that you defined for that **Business Unit** for the specified only on the Budget Period Table. When the system calculates the costs for this **Budget Period** and **Business Unit**, it converts all costs to the

Base Currency shown here. It does this so that you can compare your training expenditures and budget amounts in the *same* currency.

Click **Run** to run this request. Process Scheduler runs the Update Planned and Real Costs process at user-defined intervals.



For more information about Process Scheduler, see Process Scheduler.

When the system executes the process, it calculates totals for all cost elements for each training demand in the Budget Training business process that is associated with the **Budget Period** and **Business Unit** that you selected, and compares it to the total training budget for the specified Budget Period and Business Unit. To do so, it calculates the total training cost associated with the Training Demands in your Budget Plan for the **Budget Period** and **Business Unit**.



For more information about how the system calculates the cost of training elements, see Creating Global Scenarios.

Reviewing Your Training Costs

Once you've run the Update Planned and Real Costs process, you can use three inquiry pages to review the results of the training cost calculation for the Budget Period and Business Unit that you specified. The Budgeted Costs page lets you see how your budgeted costs compare to your realized (spent) training costs for a specific Budget Period and Business Unit.

Budgeted Costs Page

Usage	Use the Budgeted Costs page to review your Budgeted Costs compared to your realized (actual) training costs to date.
Object Name	TRN_BDGT_ACT_COST
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Inquire, Budgeted Cost, Budgeted Cost • Develop Workforce, Administer Training (USF), Inquire, Budgeted Cost, Budgeted Cost
Prerequisites	You must set up your training costs and department views before you can use this page.
Access Requirements	Enter the Budget Period, Business Unit, and Department View ID.

Budgeted Cost						
Budget Period:	K1999CALYR	Business Unit:	GBIBU	Dept View ID:	KFINANCE	
Base Currency:	USD					
Budgeted Cost						
				View All	First	1-3 of 4
						Last
Department	Budgeted			Projected/ Actual		
	Demand	Duration	Cost	Demand	Duration	Cost
KU001	0	0.0	0.000	0	0.0	0.000
				0	0.0	0.000
KU003	0	0.0	0.000	0	0.0	0.000
				0	0.0	0.000
KU005	11	176.0	0.000	0	0.0	26456.000
				0	0.0	26456.000
	11	176.0	0.000	0	0.0	26456.000
				0	0.0	26456.000

Budgeted Cost page

The system displays the **Budget Period**, **Business Unit**, and **Dept View ID** (department view ID) that you selected when you opened the Budgeted Cost inquiry page.

The system also displays the **Base Currency** for your organization, which you set for your training budget and costs in the Base Currency Table (TRN_BASE_CURRENCY).



For more information about setting up department views in the Budget Training module, see the Departmental View Page. For more information about how the system defaults currencies in the Budget Training and Administer Training modules, see Setting Up Default Training Costs.

The system converts all training costs to the base currency that was specified for your training budget, as you enter costs into the system.



For more information about how the system performs currency conversions in the Budget Training process, see Setting Up the Training Cost Currency.

The system displays the costs for the **Budget Period**, **Business Unit**, and **Dept View ID** that you specified. Budgeted costs are displayed in the **Cost** column under **Budgeted** and the current realized costs are displayed in the Cost column under **Projected/Actual**.

Viewing Budgeted Costs By Department

For each **Department** in the departmental view for this **Budget Period** and **Business Unit**, the system displays the total budgeted training **Demand**, the total **Budgeted Duration** for training, and the total **Budgeted Cost**.

Viewing Projected/Actual Costs By Department

The system displays two rows of calculations for **Projected/Actual** costs. The first row of results details **Projected** costs. The **Projected** population is made up of students that have been enrolled in the course sessions for that budget period, but have not yet completed the course (Attendance Status is something other than *Completed*).

The second row of results details the **Actual** costs. The **Actual** population is made up of students that have completed the course sessions for that budget period (Attendance Status is *Completed*).

For projected and actual costs, the system displays:

- The actual current total **Demand**; that is, the number of employees trained for all demands in the training budget.
- The total **Duration** of the training; that is, the total amount of time spent in training by the demand employees.
- The total current, actual training **Cost**; that is, the actual amount of money spent training employees in this department to date.



To see all of the budgeted training versus the current actual training information for all of the departments in the Departmental View, you may need to scroll down the page.

Viewing the Current Totals

At the bottom of the page, the system shows the total budgeted demand for all departments, the total budgeted duration time, and the total budget amount for training for this **Budget Period, Business Unit, and Dept View ID**.

The system also provides you with the total realized demand, the total realized training duration time and the total training money spent as of the date that you ran the Update Planned and Real Cost process.

Unbudgeted Cost Page

Usage	Use the Unbudgeted Cost page to review your unbudgeted training costs to date. These costs can include your projected costs without any actual expenditures, if you have not spent the projected amount.
Object Name	TRN_NOTBDGT_COST
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Inquire, Unbudgeted Cost, Unbudgeted Cost • Develop Workforce, Administer Training (USF), Inquire, Unbudgeted Cost, Unbudgeted Cost
Prerequisites	You must set up your training costs before you can use this page.
Access	Enter the Budget Period, Business Unit, and Department View ID.

Requirements

Unbudgeted Cost

Budget Period: K1999CALYR **Business Unit:** CAN01 **Dept View ID:** KCHR

Base Currency: CAD

Unbudgeted Cost						
View All First ◀ 1-6 of 6 ▶ Last						
Department	Demand	Projected		Actual		
		Duration	Cost	Demand	Duration	Cost
KC001	1	24.0	4390.000	1	24.0	4390.000
KC002	1	1.0	966.000	1	1.0	966.000
KC003	0	0.0	1129.000	0	0.0	1129.000
KC005	1	8.0	310.000	1	8.0	310.000
KC006	1	24.0	3044.000	1	24.0	3044.000
KC015	1	16.0	3117.000	1	16.0	3117.000
	5	73.0	12956.000	5	73.0	12956.000

Unbudgeted Cost page



For more information about setting up department views in the Budget Training module, see the Departmental View Page.

The system displays the **Budget Period**, **Business Unit**, and **Dept View ID** (department view ID) that you selected when you opened the Unbudgeted Cost inquiry page.

The system also displays the **Base Currency** for your organization, which you set for your training budget and costs in the Base Currency Table (TRN_BASE_CURRENCY).



For more information about how the system defaults currencies in the Budget Training and Administer Training modules, see Setting Up Training Cost Units.

The system converts all training costs to the base currency that was specified for your training budget, as you enter costs into the system.



For more information about how the system performs currency conversions in the Budget Training process, see Setting Up the Training Cost Currency.

The system displays the projected number of students enrolled in certain course sessions for the budget period in the **Demand** column under **Projected**. The **Actual** figures include the number of students who have completed the course session. For example, in the page above, **1 Demand** was enrolled (**Projected**) and **1 Demand** completed the session (**Actual**). As a result, the projected numbers and the actual numbers are the same.

However, in some instances, you may have 10 projected students, but only 7 are reflected as actual because 3 of the students in your projected demand dropped the course. As a result, you projected to incur training costs that you will not realize. You'll see the unbudgeted costs and the current realized unbudgeted expenditures for each department included in the **Budget Period**, **Business Unit**, and **Dept View ID** that you specified.

Viewing Projected Unbudgeted Costs By Department

For each **Department** in the **Dept View ID** for this **Budget Period** and **Business Unit**, the system displays the total projected unbudgeted training **Demand** for that department, the total projected unbudgeted training **Duration**, and the total projected unbudgeted **Cost** to your organization.

Viewing Actual Unbudgeted Costs By Department

The system also displays the following information for each **Department** in the **Dept View ID** as of the date you ran the Update Planned and Real Cost process:

- The actual current total unbudgeted **Demand**; that is, the number of employees trained in the department that were not included in your training demands or budget.
- The total **Duration** of the training; that is, the total amount of time spent in training by the unbudgeted employee(s).
- The total current actual unbudgeted training **Cost**; that is, the actual amount of money spent on training employees in this **Department**, to date, that was not part of the training budget.



To see all of the budgeted training versus the current actual training information for all of the departments in the Departmental View, you may need to scroll down the page.

Viewing the Current Totals

At the bottom of the page, the system shows the total for all the departments, the total projected unbudgeted demand, the total projected unbudgeted **Duration** time, and the total projected unbudgeted amount for training for this **Budget Period**, **Business Unit**, and **Dept View ID**.

The system also provides you with the total actual unbudgeted demand, the total actual unbudgeted training **Duration** time, and the total actual unbudgeted training money spent that was not part of your training budget, as of the date that you ran the Update Planned and Real Cost process.

Summary Cost Page

Usage	Use the Summary Cost page to view the compared budgeted and actual training cost totals for your entire organization.
Object Name	TRN_CMPSUMMARY_COST
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Inquire,

	<p>Summary Cost, Summary Cost</p> <ul style="list-style-type: none"> • Develop Workforce, Administer Training (USF), Inquire, Summary Cost, Summary Cost
Prerequisites	You must set up your training costs before you can use this page.
Access Requirements	Enter the Budget Period, Business Unit, and Department View ID.

Summary Cost					
Budget Period:	K1999CALYR	Business Unit:	CAN01	Dept View ID:	KCHR
Base Currency:	CAD			Demand Duration	Cost
From Budget Training	Budgeted		35	315.0	0.00
	Projected		3	48.0	2296.000
	% Projected / Budgeted		8.57	15.24	0.00
	Actual		3	48.0	2296.000
	% Actual / Projected		100.00	100.00	100.00
	% Actual / Budgeted		8.57	15.24	0.00
From Administer Training	Projected		5	73.0	12956.000
	Actual		5	73.0	12956.000
	Total Actual		8	121.0	15252.000
	% Total Projected / Budgeted		22.86	38.41	0.00
	% Total Actual / Total Projec.		100.00	100.00	100.00
	% Total Actual / Budgeted		22.86	38.41	0.00

Summary Cost page



For more information about setting up department views in the Budget Training module, see the Departmental View Page.

The system displays the **Budget Period**, **Business Unit**, and **Dept View ID** (department view ID) that you selected when you opened the Budgeted Cost inquiry page.

The system also displays the **Base Currency** for your organization, which you set for your training budget and costs in the Base Currency Table (TRN_BASE_CURRENCY).

The system converts all training costs to the base currency that is specified for your training budget, as you enter costs into the system.



For more information about how the system performs currency conversions in the Budget Training process, see Setting Up the Training Cost Currency.

From Budget Training



The results that you see here include all the demands that you budgeted for in the Budget Training module

For all of your budgeted training costs for the specified **Budget Period, Business Unit**, and departments in the **Dept View ID**, the system provides you with the following demand, duration and cost information:

Category	Demand	Duration	Cost
Budgeted	Budgeted total Demand (number of employees to be trained)	Budgeted total training Duration that you estimated as part of your training budget	Total budgeted training cost.
Projected	Projected (current realized) training Demand (number of employees that are currently trained or are in training)	Projected (current realized) Duration for the training that has occurred to date	Projected Cost for the training to date. The projected amounts here include those students that have been enrolled in the course sessions for that budget period, but have not yet completed the course (Attendance Status is other than <i>Completed</i>).
Percent of Projected (realized) Cost compared to Budgeted Cost	Projected (realized) Demand compared to Budgeted Demand	Projected (realized) Duration compared to Budgeted Duration	Projected Cost compared to Budgeted Cost. This represents the percentage of your budget that you've projected that you will spend to date. Remember, you haven't actually spent this money yet, because it is only projected.
Actual training expenses incurred to date	Actual number of employees trained (Demand)	Actual total training Duration to date	Actual cost to date.

Category	Demand	Duration	Cost
Percentage of actual costs compared to projected costs	Actual number of employees trained compared to projected number of employees trained	Actual duration amount compared to your projected training duration amount	Actual training cost compared to projected training cost. If the amount is 100 percent, then your projected budget amount equals the actual amount that you've spent. If the result is less than 100 percent, you still have projected budget money to spend. If the amount is more than 100 percent, then you've overspent your training budget.
Percentage of Actual Cost compared to your Budgeted Cost	Actual (realized) Demand compared to Budgeted Demand	Actual (realized) Duration compared to Budgeted Duration	Actual (realized) Cost compared to Budgeted Cost. This represents the percentage of your budget that you've spent to date.

From Administer Training



Any amounts that you see displayed here are for costs that were not included as part of your training budget for the budget period. This includes all training that was tracked in the Administer Training module, but was never linked with a budget training demand.

The amounts that the system displays here detail the training costs captured in the Training Administration module that are based on training expenses that are associated with training employees not included in the Budget process. In other words, the students were trained, but are outside of any training demands that are associated with the **Budget Period, Business Unit, and Dept View ID** that you selected when you entered the page. The system also displays the total training costs captured in the Administer Training module.

Category	Demand	Duration	Cost
Projected	Projected (current realized) training Demand (number of employees that are currently trained or are in training)	Projected (current realized) Duration for the training that has occurred to date	Projected Cost for the training to date. The projected amounts here include those students that have been enrolled in the course sessions for that budget period, but have not yet completed the course (Attendance Status is other than <i>Completed</i>).

Category	Demand	Duration	Cost
Actual	Actual unbudgeted employees trained	Actual unbudgeted training duration amount	Actual cost associated with training unbudgeted employees. The Actual population is made up of those students that have completed the course sessions for that budget period (Attendance Status is <i>Completed</i>).

Total Actual Costs



The amounts that you see here represent a summary of the actual costs incurred as part of the training budget (budgeted amounts) and from unbudgeted costs tracked in the Administer Training module.

Category	Demand	Duration	Cost
Total Actual	Total (current realized) training Demand (number of employees currently trained or in training)	Total (current realized) Duration for the training that has occurred to date	Total Cost for the training to date.
Percentage of Total budgeted amount that the projected amount represents	Percentage of total budgeted Demand the projected Demand represents	Percentage of total budgeted Duration the projected Duration represents	Percentage of total budgeted Cost the projected Cost represents. The projected amounts here include those students that have been enrolled in the course sessions for that budget period but have not yet completed the course (Attendance Status is other than <i>Completed</i>).

Category	Demand	Duration	Cost
Percentage of the Total Actual Amount represented by the Total Projected Amount	Percentage of the Total Actual Demand represented by the Total Projected Demand	Percentage of the Total Actual Duration represented by the Total Projected Duration	Percentage of the Total Actual Cost represented by the Total Projected Cost. The projected amounts here include those students that have been enrolled in the course sessions for that budget period but have not yet completed the course (Attendance Status is other than <i>Completed</i>).
Percentage of Total Budgeted Amount that the Actual Amount represents	Percentage of total budgeted Demand that the actual Demand represents	Percentage of total budgeted Duration that the actual Duration represents	Percentage of the total budgeted Cost that the actual Cost represents.

Reviewing French Employee Session Costs

If you're administering training programs for French workers, use the EE Session Cost Summary (FRA) page to view a summary of Course Session Cost information for the employee. This inquiry page displays information that is relevant to the French Training Report 2483 and includes information about financed training costs and chargeable amounts that aren't included on the Student Training Summary page.



You can use the EE Session Cost Summary inquiry page only after you've run the FRA Compute 2483 process.



For more information about French Training Report 2483, see Producing the French Training Report 2483.

EE Session Cost Summary Page

Usage	Use the EE Session Cost Summary page to view a summary of Course Session Cost information for an employee. This inquiry is relevant only for French organizations. Use this inquiry page only after you've run the FRA Compute 2483 process and reviewed and/or updated the
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	employee's cost information on the Track Student Cost component.
Object Name	TRN_EE_SMR_COST1
Navigation	Develop Workforce, Administer Training (GBL), Inq Lcl, FRA Student Ssn Cost Summary, EE Session Cost Summary
Prerequisites	Run the FRA Compute 2483 process.
Access Requirements	Enter the Employee ID, Course, and Session Number.

EE Session Cost Summary				
Lau,Patrick		EmpID: KC0011		
Course:	K001 Time Management	Session #: 0004		
Start/End Date:	02/08/2000 02/09/2000			
Currency Code:	USD	Financed	Company	Chargeable
Provider:	0.00	0.00	0.00	0.00
Facility:	708.29	0.00	708.29	0.00
Empl Cost:	0.00	0.00	0.00	0.00
Instructor:	236.10	0.00	236.10	0.00
Expense:	106.24	0.00	106.24	0.00
Equipment:	0.00	0.00	0.00	0.00
Total:	1050.63	0.00	1050.63	0.00

EE Session Cost Summary (employee session cost summary) page

The system displays the employee's name and **EmpID** (employee ID), the **Course** code and description, the **Session #** (session number), and the session **Start/End Date** at the top of the page. The page displays French Report 2483 cost information for one employee and course session at a time.



For more information about the French Training Report, see Producing the French Training Report 2483.

The system also displays the base **Currency Code** for your organization, which you set for your training budget and costs in the Base Currency Table (TRN_BASE_CURRENCY). To view the costs in a different currency, select another currency in the **Currency Code** field. The system converts all of the costs displayed on the page to that currency.



For more information about how the system performs currency conversions in the budget training process, see Setting Up the Training Cost Currency.

For each cost that is categorized as a **Provider** (stored on the Vendor Table), **Facility**, **Employee Cost**, **Instructor**, **Expense**, or **Equipment** amount in the French group boxes on the Track Student Cost pages on the Administer Training (GBL) menu, the system displays that cost here for the indicated session indicated.

For each charge, the system displays the following information:

- The total amount that is associated with the training category.
- The total **Financed** amount for the training category.
- The total **Company**-contributed amount for the training category.
- Any total **Chargeable** amount for the training category. Company costs are calculated as follows:
Company Costs = Total Costs - Financed Costs.



The **Chargeable** amount is based on any charges for French workers that you've indicated were chargeable on the cost pages in the Administer Training modules. Chargeable costs are also reflected in the company-contributed/financed amount, as indicated on the Course Session Cost Table. You can indicate a cost as chargeable in the Course Session Cost French group boxes on the Administer Training (GBL) menu.

At the bottom of the page, the system displays the total cost for the course session for this student, the total financed amount, the total company-contributed amount, and the total chargeable amount.



You can specify the category for a training cost for a French Student on the Catalog Cost Table, the Course Cost Table, the Course Session Cost Table, and the Track Student Cost pages. The system uses only the categories that are listed on the Track Student Cost pages, when generating the training costs for an employee, though the category information could be defaulting to the Track Student Cost pages from any one of the other higher-level tables.

CHAPTER 10

Tracking Professional Education Programs for German Workers

Companies in Germany have the option to have employees follow specific professional education programs provided by the company. This functionality enables companies offering these programs to track the steps and status of employees as they work toward their degrees.

This section shows you how to set up and use professional education programs for German workers.

Overview of German Internal Education Training Programs

The German Internal Education Training Programs enables you to set up an education plan, link an education plan to an employee, and then monitor the employee's progress in the plan.

To set up and monitor a German Internal Education Training Program:

1. Identify the steps that will make up the education plan on the Ipe Step Table Page.
2. Associate the steps to a plan on the Ipe Plan Table Page.
3. Assign a plan to an employee on the Internal Profes. Education Page.

You can also track an employee's progress in the education plan by reviewing the status on this page or by printing the German Internal Professional Education Status report.

Ipe Step Table Page

Usage	Use the Ipe (Internal Professional Education) Step Table page to identify the steps that make up an education training program.
Object Name	IPE_STEP_TABLE
Navigation	Develop Workforce, Administer Training (GBL), Setup Lcl, GER Steps Table, Ipe Step Table
Prerequisites	None
Access Requirements	Enter the Step ID. The Step ID can be up to 6 characters in length.

	Plan Table, Ipe Plan Table
Prerequisites	Before you can create a plan you need to set up the steps on the Ipe Step Table Page.
Access Requirements	Enter a Training Plan ID. Training Plan IDs can be up to 8 characters in length.

Ipe Plan Table

Plan ID: 12

Description: German Ops Plan

Short Description: GerOp

Step ID	Description	Step Type
<input type="text"/>	<input type="text"/>	<input type="text"/>

View All First 1 of 1 Last

+ -

GER Plan Table (German plan table) - Ipe Plan Table page

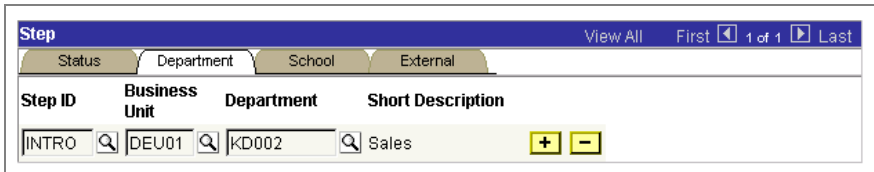
- Plan ID** The system displays the **Plan ID** that you entered to access the page.
- Description** Enter or update the description of the **Plan ID**. This can be up to 30 characters in length.
- Short Description** Enter or update the short description of the **Plan ID**. This can be up to 10 characters in length.
- Step ID** This is where you add or delete the steps that make up this plan. When you add a step, the system will automatically display the information about that step.

Internal Profes. Education Page

Usage	Use the Internal Profes. Education (internal professional education) page to enter or track German workers who are participating in your organization’s training program.
Object Name	EE_IPE_PLAN
Navigation	Develop Workforce, Administer Training (GBL), Use Lcl, GER Internal Education, Internal Profes. Education
Prerequisites	Enter the employee’s educational background information on the Education - Professional Ed. (Education) and Training Page to record additional education information for German employees.
Access	Enter the Employee ID and Employee Record Number. The search box displays only those employees who have been entered on the Education

- From Date** Enter the date the employee starts this step.
- Thru Date** Enter the date the employee completes the step.
- Step Status** Select **Step Status** from the list of available options.

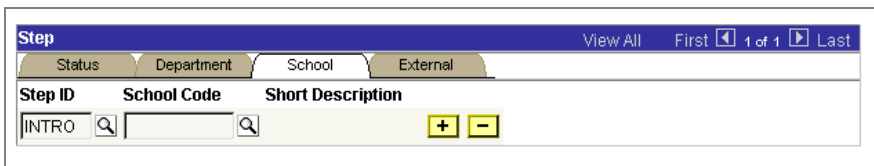
Department Tab



Internal Profes. Education: Department page

- Business Unit** The system populates the **Business Unit** based on the Business Unit and Department in the employee’s Job Record.
- Department** The system populates the **Department** based on the Business Unit and Department in the employee’s Job Record.
- Short Description** The system displays the department description.

School Tab



Internal Profes. Education: School page

- School Code** Select the **School Code** from the available options.
- Short Description** When you select the **School Code**, the system displays the school **Short Description**.

External Tab

The screenshot shows a software interface for managing training steps. At the top, there is a blue header bar with the word "Step" on the left and navigation controls "View All", "First", "1 of 1", and "Last" on the right. Below the header is a tabbed interface with four tabs: "Status", "Department", "School", and "External". The "External" tab is currently selected. Underneath the tabs, there is a section labeled "Step ID" with the word "External" to its right. Below this, there is a text input field containing the text "INTRO". To the right of the input field are two small yellow buttons with black text: a plus sign "+" and a minus sign "-".

Internal Profes. Education: External page

Producing the French Training Report 2483

The Training Report 2483 (TRN029) is a French regulatory report that is used to declare vocational training that your company has provided to your employees. It is also known as the Declaration 2483 Report. The purpose of the report is to compile information about the amount of money your company has spent on training.



The report is also located in the Report Regulations (FRA) menu.

The report provides details about ten groups of information designated by the letters *B* through *M*. For instance, *B* is General Information, and *C* is Costs Summary. You'll use the PeopleSoft Application Engine in your PeopleSoft Human Resources system to calculate and compile the information for the training report, saving you a large amount of time and effort.



For more information about the 2483 indicators delivered by PeopleSoft and advice on how the 2483 indicators are calculated, see Meeting French Reporting Requirements.



For more information about the use of the PeopleSoft Application Engine in PeopleSoft Human Resources, see Introducing Application Engine.

Overview of the French Training Report 2483 Process

To prepare your Training Report 2483:

1. Set up the training report groups.
2. Set up the training report indicators.
3. Enter the training report parameters
4. Run the Compute Training Report 2483 (DEC2483) process calculation for all of the Indicators.

5. Exercise the option to review the results of the process calculations, if desired.
6. Run the Training Report 2483 (TRN029) to print, or export to a file, the results of the process calculations.

Setting Up Training Report Groups and Indicators

Your second and third steps are to set up your training report groups and indicators. You'll do this using the 2483 Table pages.

Use the 2483 Group page to enter, review, and update the ten groups defined by the French government. Use the 2483 Indicator page to enter, review, and update the indicators for each group.

The 2483 Group and 2483 Indicator pages are also located on the Report Regulations (FRA) menu so that you can review and update the information, if needed.



Important! In PeopleSoft Human Resources, the Training Report 2483 Groups and Indicators are delivered as system data.

FRA 2483 Table - 2483 Group Page

Usage	Use the 2483 Group page to review the group setup for your French Training Report 2483 report.
Object Name	GROUP_2483_TBL_FRA
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup Lcl, FRA 2483 Table, 2483 Group • Monitor Workplace, Report Regulations (FRA), Setup, 2483 Table, 2483 Group
Prerequisites	PeopleSoft delivers these groups as part of your system data in PeopleSoft Human Resources. Any changes that you make to the groups here will directly impact the way the system generates your French Training Report 2483. Therefore, you should make changes only in response to changes in the French regulatory reporting requirements.
Access Requirements	You can select from the predefined 2483 Report Groups <i>B, C, E, F, H, J, L, and M.</i>

2483 Group 2483 Indicator

2483 Group: B

***Description:**

Short Description:

Description:

***Number of Columns:**

Descr. 1 **Descr. 2** **Descr. 3** **Descr. 4** **Descr. 5** **Descr. 6**

FRA 2483 Table - 2483 Group page

The following groups (used in the **2483 Group** field) are delivered with your PeopleSoft Human Resources system:

Group ID	Description
<i>B</i>	General Information
<i>C</i>	Costs Summary
<i>E</i>	Training Levy Credit
<i>F</i>	Company Cost
<i>G</i>	Financing Sandwich Course
<i>H</i>	Finance Training Leave
<i>J</i>	Finance Training Leave Limited
<i>L</i>	Distribution by Category
<i>M</i>	Distribution by Gender and Age

You can review the **Short Description** and **Description** and, in the second **Description** field, enter any comments that you want, to provide additional information about this group. The **Description** comments that you enter won't impact your training reporting. You can review the **Number of Columns** for this group. The **Number of Columns** that you specify here impacts the number of columns that the system displays in the 2483 Report for this group. If you change the **Number of Columns** when you move out of the field the **Number of Column** description labels (**Descr 1** through **Descr 6**) are changed automatically.

The number of columns and the descriptions on this page will be used as defaults on the indicator page when you enter a new indicator for a group.

We provide the appropriate labels for each column here. The report prints **Descr 1**, **Descr 2**, and so forth as the column label on the French Training Report.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

FRA 2483 Table - 2483 Indicator Page

Usage	Use the 2483 Indicator page to review your indicators setup for your French Training Report 2483 groups.
Object Name	INDIC_2483_TBL_FRA
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup Lcl, FRA 2483 Table, 2483 Indicator • Monitor Workplace, Report Regulations (FRA), Setup, 2483 Table, 2483 Indicator
Prerequisites	PeopleSoft deliver these groups as part of your system data in PeopleSoft Human Resources. Any changes that you make to the groups here will directly impact the way the system generates your French Training Report 2483. Therefore, you should make changes only in response to changes in the French regulatory reporting requirements.
Access Requirements	You can select from the predefined 2483 Report Groups <i>B, C, E, F, H, J, L</i> and <i>M</i> .

FRA 2483 Table - 2483 Indicator page

The system displays the **2483 Group** that is associated with the Indicators on this page.

You can review the Group **Description** and **Short Description**, and enter any **Description** comments that you want, to provide additional information about this group. The **Description** comments that you enter here won't impact your training reporting.

You can review the **Number of Columns** for the Indicator. The Number of Columns that you specify here impacts the number of Indicator columns that the system displays in the 2483 Report for this Group. If you change the Number of Columns and press TAB to move out of the field, the **Number of Column** description labels fields (**Descr 1**, for example) are changed automatically.

We provide the appropriate labels for each column. The report prints **Descr 1**, **Descr 2**, and so forth as the Indicator label on the French Training Report.



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Entering Training Report Parameters

The 2483 report requires additional parameters that are not stored in your PeopleSoft Human Resources system. Before you can run the report, you enter these parameters on the Trn 2483 Parameters page.

Trn 2483 Parameters Page

Usage	Use the Trn 2483 Parameters page to enter data that is required for your 2483 report. Much of the information required for the 2483 report is stored in your PeopleSoft Human Resources system and in your payroll system. You need to enter the remaining required data on this page before you can print the report.
Object Name	TRN_2483_PARM
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Setup Lcl, FRA 2483 Parameters, Trn 2483 Parameters Setup • Monitor Workplace, Report Regulations (FRA), Setup, 2483 Parameters, Trn 2483 Parameters Setup
Prerequisites	None
Access Requirements	Enter a company code.

Trn 2483 Parameters Setup

Company: KF1 Business Institute - France

2483 Report Parameters View All First 1 of 1 Last

*Effective Date: 12/08/2000

Reduction Rate (10 Emp. Mark):

Group C
Indicator 8:
Indicator 12:

Group F
Indicator 1:
Reduction Rate:

Group G
Reduction Rate:
Indicator 11:
Indicator 12:

Group H
Reduction Rate:
Indicator 17:
Indicator 18:

Group J
Indicator 20:
Indicator 22:

Group K
Indicator 25:
Indicator 26:

Trn 2483 Parameters Setup (training 2483 parameters setup) page

The system displays the **Company** code you selected and the company name. These fields are for information only.

Effective Date

Enter the effective date for the parameters. The system defaults the effective date to your system date; you can override it as necessary.

Reduction Rate (10 Emp. Mark) (reduction rate (10 employee mark))

If your organization is entitled to a reduction, based on the number of employees employed over the previous seven years, enter the percentage in this field.

Group C

Indicator 8

Enter the amount paid to a registered body for training.

Indicator 12

Enter amount of other payments related to training.

Group F

Indicator 1

Enter the total of the annual salaries for your organization.

Reduction Rate

The amount that an organization must spend on vocational training is determined by the total annual salary and the type of organization. Enter the multiplier (*1*, *5*, or *2*) that applies to your organization.

Group G**Reduction Rate**

The amount that your organization must spend on sandwich training depends on whether your organization is liable for the tax known as *La Taxe d'apprentissage*. Enter the multiplier, **0.3** (percent) or **0.4** (percent), that applies to your organization.

Indicator 11

Enter the amount paid to a registered body for sandwich training courses.

Indicator 12

Enter the amount paid directly by the organization for sandwich courses.

Group H**Reduction Rate**

The amount that an organization must spend on financing training leave depends on the type of organization. Enter the multiplier, **0.2** (percent) or **0.3** (percent), that applies to your organization.

Indicator 17

Enter the amount paid to a registered body for the Capital Temps Formation. In this scheme, employers' payments are converted to a number of hours of training that an employee is entitled to take.

Indicator 18

Enter the amount paid to a registered body for training leave.

Group J**Indicator 20**

Enter the total salaries for your limited contract employees.

Indicator 22

Enter the amount paid to a registered body for training leave for limited contract employees.

Group K**Indicator 25**

If your organization hasn't spent the required amount on training, you must make a regularization payment to the French authorities. Enter the amount of the payment in this field.

Indicator 26

If your organization is liable for an adjustment payment for failing to consult the Company Work Council, enter the amount of the adjustment in this field.



For more information about how to calculate indicators required for report 2483, see the official documentation issued by the French authorities, such as *Les Fiches Pratiques de la Formation Continue: Guide Special Declarations 2483, 2486, 2068*.

Running the Compute Training Report Process

Once you have completed the FRA 2483 Table pages and entered additional parameters in the Trn 2483 Parameters Page, you are ready to run the Compute Training Report process.

FRA Compute 2483 - Declaration 2483 Page

Usage	Use the FRA Compute 2483 - Declaration 2483 page to run the Compute Training Report 2483 (DEC2483) process. Run this process once you have entered all of the Training Report Group and Indicator information into your PeopleSoft Human Resources system.
Object Name	RUNCTL_DEC2483
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Proc Lcl, FRA Compute 2483, Declaration 2483 • Monitor Workplace, Report Regulations (FRA), Process, Compute Training Report 2483, Declaration 2483
Prerequisites	Enter all Training Report Group and Indicator information.
Access Requirements	Run Control ID.

Declaration 2483

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters:

Company: Business Institute - France

Calendar Year: Creation Date:

FRA Compute 2483 - Declaration 2483 page

This process uses an Application Engine process in your PeopleSoft Human Resources system to gather all of the information that is needed to produce the training report, saving you a large amount of time and effort.



For more information about the use of the Application Engine in PeopleSoft Human Resources, see *Introducing Application Engine*.

Select the **Company** that you want to run the French Training Report 2483, and enter the **Calendar Year** that the system should use to determine cost information for that report. You can also specify the **Creation Date** for the report. The system displays this date for informational purposes so that you can easily determine the actual date on which the system ran the report.

For a French Company, spending a given percentage of all the compensation for all the employees of your company is mandatory. This report aims at verifying that your organization has met its mandated training requirements each year, and it will let you save money by getting a tax deduction from the government. The French Training Report also provides you with a qualitative view of the training policy for a company for a particular calendar year.

Click **Run** to run this request. Process Scheduler runs the Compute Training Report process at user-defined intervals.



For more information about Process Scheduler, see *Process Scheduler*.

Reviewing the Results of Your Compute Training Report Process Calculations

Once you have run the Compute Training Report process you need to review the results of the process before you finally generate the report. Use the Edit 2483 page to view the results and edit them where necessary.

FRA Edit 2483 - Edit 2483 Page

Usage	Use the Edit 2483 page to review, and modify if needed, the results of the calculations run by the Compute Training Report process on each of your Indicators. Also, some indicators cannot be computed. In those cases, you can manually compile the necessary information and use this page to enter the information into the system. That way, you'll ensure that all of the information you need is displayed on the 2483 report.
Object Name	EDIT_2483_FRA
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Use Lcl, FRA Edit 2483, Edit 2483 • Monitor Workplace, Report Regulations (FRA), Use, Edit 2483, Edit 2483
Prerequisites	Enter all Training Report Group and Indicator information.

Access Requirements	Enter a User ID and Run Control ID.
---------------------	-------------------------------------

(Edit 2483)

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

2483 Group [View All](#) First Last

2483 Group: B General Information **Creation Date:** 04/28/2000

2483 Indicator [View All](#) First Last

2483 Indicator:	02	Male				<input type="button" value="+"/> <input type="button" value="-"/>
NonQualWrk	QualWrk	OfficeWrk	Manager	Executive	Total	
<input type="text"/>	<input type="text"/>	<input type="text" value="4.000"/>	<input type="text" value="8.000"/>	<input type="text" value="1.000"/>	<input type="text" value="13.000"/>	

2483 Indicator:	03	Female				<input type="button" value="+"/> <input type="button" value="-"/>
NonQualWrk	QualWrk	OfficeWrk	Manager	Executive	Total	
<input type="text"/>	<input type="text" value="2.000"/>	<input type="text" value="2.000"/>	<input type="text" value="2.000"/>	<input type="text"/>	<input type="text" value="6.000"/>	

2483 Indicator:	04	Male + Female				<input type="button" value="+"/> <input type="button" value="-"/>
NonQualWrk	QualWrk	OfficeWrk	Manager	Executive	Total	
<input type="text"/>	<input type="text" value="2.000"/>	<input type="text" value="6.000"/>	<input type="text" value="10.000"/>	<input type="text" value="1.000"/>	<input type="text" value="19.000"/>	

FRA Edit 2483 - Edit 2483 page

The system displays the **Run Control ID** that you used to open the page and the French Training Report 2483 **Creation Date** that you specified on the Declaration 2483 Process run control page.

For each **Group** specified on your 2483 Group Table, the system displays the calculation results for each **Indicator** associated with a Group on the 2483 Indicator Table. The system populated the rows and columns of data that you see here, based on the results of the Declaration 2483 Process.

You can edit any of the amounts on the page as necessary. When you generate the French Training Report, using the Training Report 2483 page, the system uses the results displayed on this page to generate your training report.



If you rerun the Declaration 2483 Process after making edits to the amounts in the Edit 2483 page, the system overwrites any edits that you made to the Declaration 2483 results, prior to rerunning the Declaration 2483 process.



For more information about running the Declaration 2483 Process, see Entering Training Report Parameters.



The page is also included in the system at the Report Regulations (FRA) menu. Although the page has a different name on that menu, it is the same page.

Running the French Training Report 2483

When you are satisfied with the results of the Compute Training Report process, you run the actual report on the Report Training 2483 page. The Indicators required by the French government are calculated by your PeopleSoft Human Resources system and tabulated for you in this Crystal report.

FRA Training Report 2483 - Report Training 2483 Page

Usage	Use the Training Report 2483 page to run the report and send the output to a printer or export the report to a file.
Object Name	RUNCTL_TRN029
Navigation	<ul style="list-style-type: none"> • Develop Workforce, Administer Training (GBL), Report Lcl, FRA Training Report 2483, Report Training 2483 • Monitor Workplace, Report Regulations (FRA), Report, Training Report 2483, Report Training 2483
Prerequisites	Enter all Training Report Group and Indicator information.
Access Requirements	To enter this page, use the <i>same</i> Run Control ID that you used to launch the Compute Training Report 2483 (DEC2483) process. If you use the same Run Control ID to open the report run control page as you used to generate the Declaration 2483 Process, the report run control page displays the same parameters that you used to run the Declaration 2483 process here.

The screenshot shows the 'Report Training 2483' interface. At the top, it displays 'Report Training 2483'. Below this, the 'Run Control ID' is set to '01'. To the right of the ID are three links: 'Report Manager', 'Process Monitor', and a yellow 'Run' button. A horizontal line separates this section from the 'Report Request Parameters' section, which has a light brown header. Under this header, the following parameters are displayed: 'Company:' (with a blank field), 'Calendar Year:' (with a blank field), and 'Creation Date:' followed by the value '14/08/2000'.

FRA Training Report 2483 - Report Training 2483 page

The system displays the **Run Control ID** that you selected.

The system also displays the **Company** and the **Calendar Year** that the report you're about to generate will cover. The system also displays the **Creation Date** for the Declaration 2483 Process results on which the report you're about to generate is based.



For more information about the Declaration 2483 Process, see Entering Training Report Parameters.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

CHAPTER 12

Running Administer Training Reports

PeopleSoft Human Resources supplies a group of standard reports to help you track and review courses, training costs, and produce training letters to notify students of changes in their course enrollment.

In this section, we've listed the reports by name, and provided you with a description of each.



For more information about generating reports, see Introduction to PeopleSoft Reporting. **For a complete listing** of all PeopleSoft Human Resources reports by Report Name, see List of Reports in PeopleSoft Human Resources.

List of Administer Training Reports

<i>Report Name</i>	<i>Report ID</i>	<i>Location</i>	<i>Global or Local</i>
Active Scenario Summary	TRN010	Develop Workforce, Budget Training, Report	GBL
Attendance Status	TRN018	Develop Workforce, Administer Training, Report	GBL
Course Category	TRN024	Develop Workforce, Administer Training, Report	GBL
Course Description	TRN023	Develop Workforce, Administer Training, Report	GBL
Course Equipment	TRN025	Develop Workforce, Administer Training, Report	GBL
Course Rating	TRN017	Develop Workforce, Administer Training, Report	GBL
Course Rating Templates	TRN019	Develop Workforce, Administer Training, Report	GBL
Course Session Roster	TRN002	Develop Workforce, Administer Training, Report	GBL
Course Table	PER703	Develop Workforce, Administer Training, Report	GBL

Course Vendors	TRN026	Develop Workforce, Administer Training, Report	GBL
Course Waiting List	TRN003	Develop Workforce, Administer Training, Report	GBL
Employee Session Cost Summary	TRN032	Develop Workforce, Administer Training, Report	GBL
Equipment Checklist	TRN034	Develop Workforce, Administer Training, Report	GBL
FRA Training Report 2483	TRN029	Develop Workforce, Administer Training, Report Lcl	GER
GER Internal Professional Education Status	PER107GR	Develop Workforce, Administer Training, Report Lcl	GER
Global Scenario Summary	TRN011	Develop Workforce, Budget Training, Report	GBL
Prerequisite Courses	TRN027	Develop Workforce, Administer Training, Report	GBL
SF182	FGSF182	Develop Workforce, Administer Training, Report	USF
Statistics of EEs Enrolled	TRN022	Develop Workforce, Administer Training, Report	GBL
Student Training History	TRN020	Develop Workforce, Administer Training, Report	GBL
Target Course Certifications	TRN016	Develop Workforce, Administer Training, Report	GBL
Target Qualifications	TRN028	Develop Workforce, Administer Training, Report	GBL
Training Facility Schedule	TRN005	Develop Workforce, Administer Training, Report	GBL
Training Instructor Schedule	TRN033	Develop Workforce, Administer Training, Report	GBL
Training Letters	TRN001	Develop Workforce, Administer Training, Report	GBL
Training Plan: Cost Detail	TRN036	Develop Workforce, Budget Training, Report Lcl	FRA
Training Plan: Distribution	TRN035	Develop Workforce, Budget Training, Report Lcl	FRA
Training Plan Summary	TRN030	Develop Workforce, Budget Training, Report	GBL

Training Program	TRN021	Develop Workforce, Administer Training, Report	GBL
Training Schedule	TRN004	Develop Workforce, Administer Training, Report	GBL

Generating the Active Scenario Summary Report

The Active Scenario Summary report summarizes the training demands that have been approved in the active scenario for a business unit.



For more information about setting up scenarios and making scenarios active, see Planning Training Budgets for Your Organization.

Active Scenario Summary Page

Usage	Use this run control page to run the Active Scenario Summary report.
Object Name	RUNCTL_TRN010
Navigation	Develop Workforce, Budget Training (GBL), Report, Active Scenario Summary, Active Scenario Summary
Access Requirements	Enter a Run Control ID.

Active Scenario Summary

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Budget Period: 2000 Training Budget Period

Business Unit: Global Business Institute BU

Active Scenario Summary page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID, Business Unit.**

Select the **Budget Period** from the list of **Budget Periods** you have set up on the Budget Period Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Active Scenario Summary Report

Description	The Active Scenario Summary report provides a summary of approved training demands and budget information for a business unit.
Report ID	TRN010
Type of Report	SQR
Parameters	Budget Period, Business Unit
Source	RUNCTL_TRN010
Source Records	PS_BUDGET_PERIOD, PS_TRN_SCENARIO , PS_TRN_SIMULATION, PS_TRN_DEMAND
Sorted By	None



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Attendance Status Report

The Attendance Status report summarizes the status of students associated with a course session.



For more information about managing enrollment, see Enrolling or Waitlisting Students.

Course Attendance Status Page

Usage	Use this run control page to run the Course Attendance Status report.
Object Name	RUNCTL_TRN018
Navigation	Develop Workforce, Administer Training (GBL), Report, Attendance Status, Course Attendance Status Develop Workforce, Administer Training (USF), Report, Attendance

	Status, Course Attendance Status
Access Requirements	Enter a Run Control ID.

Course Attendance Status

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters:

Course Code: Time Management

Course Session Nbr:

Course Attendance Status page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Select the **Course Code** from the course codes that you have set up in the Course Table.

Select the **Course Session Nbr** from the list of active sessions that you have set up in the Course Session Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Attendance Status Report

Description	The Attendance Status report lists the attendance status of the students in a course.
Report ID	TRN018
Type of Report	SQR
Parameters	Course, Session
Source	RUNCTL_TRN018
Source Records	PS_TRAINING, PS_COURSE_TBL, PS_CRSE_SESSN_TBL
Sorted By	None



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Course Category Report

The Course Category report lists the categories that you have set up in your training catalog.



For more information about setting up categories, see *Setting Up Course Categories*.

Course Category Page

Usage	Use this run control page to run the Course Category report.
Object Name	RUNCTL_TRN024
Navigation	Develop Workforce, Administer Training (GBL), Report, Course Category, Course Category Develop Workforce, Administer Training (USF), Report, Course Category, Course Category
Access Requirements	Enter a Run Control ID.

Course Category page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Select the **Course Code** from the course codes you have set up in the Course Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Course Category Report

Description	The Course Category report lists the Course Categories.
Report ID	TRN024
Type of Report	Crystal
Parameters	Course
Source	RUNCTL_TRN024
Source Records	PS_COURSE_TBL, PS_COURSE_EQUIP, PS_TRN_EQUIP_TBL, PS_COST_UNIT_TBL PS_COURSE_DESCR.
Sorted By	Equipment/Material Code



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Course Description Report

The Course Description report lists the description of a selected course.

Course Description Page

Usage	Use this run control page to run the Course Description report.
Object Name	RUNCTL_TRN023
Navigation	Develop Workforce, Administer Training (GBL), Report, Course Description, Course Description Develop Workforce, Administer Training (USF), Report, Course Description, Course Description
Access Requirements	Enter a Run Control ID.

Course Description

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters:

Course Code: Time Management

Course Description page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Select the **Course Code** from the course codes you have set up in the Course Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Course Description Report

Description	The Course Description report lists the description of a course.
Report ID	TRN023
Type of Report	Crystal
Parameters	Course
Source	RUNCTL_TRN023
Source Records	PS_COURSE_TBL, PS_COURSE_DESCR, PS_COST_UNIT_TBL
Sorted By	Course description type



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Course Equipment Report

The Course Equipment report lists the equipment that you need for a selected course. You set up this information on the Course Table.



For more information about defining the equipment for a course, see the Course Table - Equipment Page.

Course Equipment Page

Usage	Use this run control page to run the Course Equipment report.
Object Name	RUNCTL_TRN025
Navigation	Develop Workforce, Administer Training (GBL), Report, Course Equipment, Course Equipment Develop Workforce, Administer Training (USF), Report, Course Equipment, Course Equipment
Access Requirements	Enter a Run Control ID.

Course Equipment page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Select the **Course Code** from the course codes you have set up in the Course Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Course Equipment Report

Description	The Course Equipment report lists the equipment needed for a course.
Report ID	TRN025
Type of Report	Crystal
Parameters	Course
Source	RUNCTL_TRN025
Source Records	PS_COURSE_TBL, PS_TRN_CATALOG_TBL, PS_TRN_CAT_TBL, PS_TRN_SUBCAT_TBL, PS_COST_UNIT_TBL
Sorted By	Category, Subcategory, Course offering



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Course Rating Report

The Course Rating report details the ratings for course sessions of a selected course.



For more information about recording course evaluations, see the Course Session Evaluations Page.

Course Rating Page

Usage	Use this run control page to run the Course Rating report.
Object Name	RUNCTL_TRN017
Navigation	Develop Workforce, Administer Training (GBL), Report, Course Rating, Course Rating Develop Workforce, Administer Training (USF), Report, Course Rating, Course Rating
Access Requirements	Enter a Run Control ID.

Course Rating page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Select the **Course Code** from the course codes you have set up in the Course Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Course Rating Report

Description	The Course Rating report lists the evaluation rating for a course.
Report ID	TRN017
Type of Report	Crystal
Parameters	Course
Source	RUNCTL_TRN017
Source Records	PS_COURSE_TBL, PS_CRSE_SESSN_TBL, PS_CRSE_SESS_INSTR, PS_CRSE_SESS_RATNG, PS_COST_UNIT_TBL, PS_COURSE_DESCR
Sorted By	Session Number, Rating Area



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Course Rating Templates Report

The Course Rating Templates report prints the template form that is completed by students enrolled in a course session.



For more information about recording course evaluations, see the Course Session Evaluations Page.

Course Rating Templates Page

Usage	Use this run control page to run the Course Rating Templates report.
Object Name	RUNCTL_TRN019
Navigation	Develop Workforce, Administer Training (GBL), Report, Course Rating Templates, Course Rating Templates Develop Workforce, Administer Training (USF), Report, Course Rating Templates, Course Rating Templates
Access Requirements	Enter a Run Control ID.

Course Rating Templates page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Select the **Course Code** from the course codes that you have set up in the Course Table.

Select the **Course Session Nbr** from the list of active sessions that you have set up in the Course Session Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Course Rating Templates Report

Description	The Course Rating Templates report is the evaluation template to be filled by the students enrolled for a course and session.
Report ID	TRN019
Type of Report	Crystal
Parameters	Course, Session
Source	RUNCTL_TRN019
Source Records	PS_CRSE_SESSN_TBL, PS_COURSE_TBL, PS_TRAINING, PS_CRSE_SESS_DATES, PS_CRS_1ST_SESS_VW
Sorted By	



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Course Session Roster Report

The Course Session Roster report provides details of a course session and lists the students enrolled in the session.



For more information about enrolling students, see *Enrolling or Waitlisting Students*.

Course Session Roster Page

Usage	Use this run control page to run the Course Session Roster report.
Object Name	RUNCTL_TRN002
Navigation	Develop Workforce, Administer Training (GBL), Report, Course Session Roster, Course Session Roster Develop Workforce, Administer Training (USF), Report, Course Session Roster, Course Session Roster

Access Requirements	Enter a Run Control ID.
---------------------	-------------------------

Course Session Roster

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Report Request Parameters:

Course: Time Management

AND

Session #:

OR

Course Start Date:

Course Session Roster page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Select the **Course Code** from the course codes you have set up in the Course Table.

Select the **Session #** (session number) from the list of active sessions, or enter a **Course Start Date.**

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Course Session Roster Report

Description	The Course Session Roster report lists the course name, session number, session start date, and all students enrolled in this course.
Report ID	TRN002
Type of Report	Crystal
Parameters	Course Number, Session Number or Course Number, Session Start Date
Source	RUNCTL_TRN002
Source Records	PS_TRAINING , PS_COURSE_TBL , PS_PERSONAL_DTA_VW
Sorted By	None



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Course Table Report

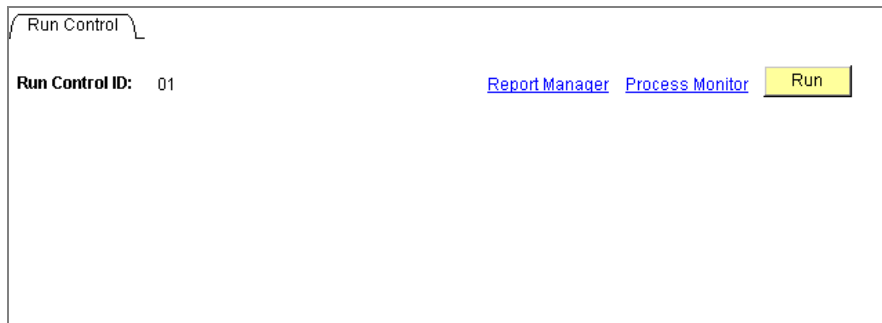
The Course Table report lists details of all the courses that you have set up in your Course Table.



For more information about creating courses, see *Setting Up Training Courses*.

Course Table Page

Usage	Use this run control page to run the Course Table report.
Navigation	Develop Workforce, Administer Training, Report, Course Table
Access Requirements	Enter a Run Control ID.



Course Table – Run Control page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see *Process Scheduler*.

Course Table Report

Description	The Course Table report prints a list of the courses available and includes a description of the course, a type code, the location, duration, and school. You can use it to track internal training courses as well as those offered by outside vendors.
Report ID	PER703
Type of Report	Crystal
Parameters	None
Source	PRCSRUNCNTL
Source Records	PS_COURSE_TBL, PS_COST_UNIT_TBL
Sorted By	None



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Course Vendors Report

The Course Vendors report lists the vendors that you have associated with a course on the Course Table.



For more information about entering vendor information for courses, see *Setting Up Training Courses*.

Course Vendors Page

Usage	Use this run control page to run the Course Vendors report.
Object Name	RUNCTL_TRN026
Navigation	Develop Workforce, Administer Training (GBL), Report, Course Vendors, Course Vendors Develop Workforce, Administer Training (USF), Report, Course Vendors, Course Vendors
Access	Enter a Run Control ID.

Requirements

Course Vendors

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) [Run](#)

Report Request Parameters:

Course Code: Time Management

Course Vendors page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Select the **Course Code** from the course codes you have set up in the Course Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Course Vendors Report

Description	The Course Vendors report lists the vendors that are used for a course.
Report ID	TRN026
Type of Report	Crystal
Parameters	Course
Source	RUNCTL_TRN026
Source Records	PS_COURSE_TBL, PS_TRN_PROV_COST, PS_TRN_VENDOR_TBL, PS_COST_UNIT_TBL, PS_COURSE_DESCR
Sorted By	Vendor ID



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Course Waiting List Report

The Course Waiting List report lists the students on the course or session waiting list for a course.



For more information about adding students to waiting lists, see [Managing Waiting Lists](#).

Course Waiting List Page

Usage	Use this run control page to run the Course Waiting List report.
Object Name	RUNCTL_TRN003
Navigation	Develop Workforce, Administer Training (GBL), Report, Course Waiting List, Course Waiting List Develop Workforce, Administer Training (USF), Report, Course Waiting List, Course Waiting List
Access Requirements	Enter a Run Control ID.

Course Waiting List page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Select the **Course Code** from the course codes that you have set up in the Course Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see [Process Scheduler](#).

Course Waiting List Report

Description	The Course Waiting List report lists all students who are on the course or session wait list for this course.
Report ID	TRN003
Type of Report	Crystal
Parameters	Course Number
Source	RUNCTL_TRN003
Source Reports	PS_TRAINING, PS_COURSE_TBL, PS_PERSONAL_DTA_VW
Sorted By	Attendance



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Employee Session Cost Summary Report

The Employee Session Cost Summary report summarizes the costs associated with an employee who is attending a training course.



For more information about how to process student costs, see *Calculating and Tracking Student Costs*.

EE Sessn Cost Summary Page

Usage	Use the EE Sessn Cost Summary (employee session cost summary) page to run a report of costs associated with an employee attending a course.
Object Name	RUNCTL_TRN032
Navigation	Develop Workforce, Administer Training (GBL), Report, EE Session Cost Summary, EE Sessn Cost Summary
Prerequisites	Before you can run this report, you must run the Compute Student Cost process which calculates the student costs for a given budget period and selected course sessions.
Access	Enter a Run Control ID.

Requirements	
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EE Sessn Cost Summary

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters:

EmpID: Davies, Craig R

Course: Professional Presentations

Session #:

EE Sessn Cost Summary (employee session cost summary) page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID** and **EmpID** (employee ID).

Course Select the **Course** from the list of course codes. The system displays only the courses that the employee has completed. When you move out of this field, the system displays the course title.

Session # (session number) Select the course session from the list of valid sessions.

Click **Run** to run the report using Process Scheduler. The EE Session Cost Summary job runs two processes to produce the report:

- EE Session Costs (HR_TRNEECOST). This is an application engine process that extracts the costs and stores them in a temporary table (PS_TRN032_TAO). The system runs this process first to generate the data for the report.
- EE Session Cost Summary. This is an SQR process that generates the report using the data in the temporary table.



For more information about Process Scheduler, see Process Scheduler.

Employee Session Cost Summary Report

Description	The Employee Session Cost Summary report lists the costs associated with an employee who is attending a training course. There is a cost for each of the following: salary, vendor, facility, equipment, instructor,
-------------	--

	employee expense, and session expense.
Report ID	TRN032
Type of Report	SQR
Parameters	Employee ID, Course, and Session Number
Source	RUNCTL_TRN032
Source Records	PS_CRSE_SESSN_TBL, PS_COURSE_TBL, PS_PERSONAL_DATA, PS_RUN_CNTL_TRN032, PS_TRN032_TAO
Sorted By	Cost type



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Equipment Checklist Report

The Equipment Checklist report provides a list of the equipment that you need for a course session.



For more information about defining equipment for a course session, see *Planning and Setting Up Course Sessions*.

Equipment Checklist Page

Usage	Use the Equipment Checklist page to generate a listing of the equipment required for a course session.
Object Name	RUNCTL_TRN034
Navigation	Develop Workforce, Administer Training (GBL), Report, Equipment Checklist, Equipment Checklist
Prerequisites	Before you can run the report, you must have set up the course session in the Course Session Table.
Access Requirements	Enter a Run Control ID.

Equipment Checklist

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Report Request Parameters:

Course: Time Management

Course Session Nbr:

Equipment Checklist page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Course Select the **Course** from the list of valid values.

Course Session Nbr (course session number) Select the **Course Session Nbr** from the list of course sessions.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Equipment Checklist Report

Description	The Equipment Checklist report lists the equipment required for a course session. For each item, the report shows the quantity required, the number available in the training room and facility, and the total number that has been booked at the facility for that period.
Report ID	TRN034
Type of Report	SQR Report
Parameters	Course Code and Course Session Number
Source	RUNCTL_TRN034
Sorted By	Equipment Code



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the French Training Report 2483

The Training Report 2483 (TRN029), or the Declaration 2483 Report, is a French regulatory report in which you declare what vocational training your company has provided to your employees. The report compiles information about the amount of money that your company has spent on training.



For more information about preparing this report, see Producing the French Training Report 2483.

Report Training 2483 Page

Usage	Use this run control page to run the French Training Report 2483.
Object	RUNCTL_TRN029
Navigation	Develop Workforce, Administer Training (GBL), Report Lcl, FRA Training Report 2483, Report Training 2483 Monitor Workplace, Report Regulations (FRA), Report, Training Report 2483, Report Training 2483
Prerequisites	Before running this report, you must: Run the Compute Training Report 2483 (DEC2483) process to calculate the indicators. Check the results of the calculation and update them, if necessary, on the FRA Edit 2483 - Edit 2483 Page.
Access Requirements	Enter a Run Control ID.

Report Training 2483

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Report Request Parameters:

Company:

Calendar Year: **Creation Date:** 26/10/2000

Report Training 2483 page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

The fields on this page are set up when you run the Compute Training Report 2483 process.



For more information about these fields, see Running the Compute Training Report Process.

FRA Training Report 2483

Description	The Training Report 2483 is a French regulatory report that is used to declare vocational training that your organization has provided to your employees. In France, organizations with more than 10 employees must provide detailed information on training policy for the organization for a given year through several indicators. This report compiles the results of the calculation of the 2483 indicators.
Report ID	TRN029
Type of Report	Crystal Report
Parameters	Company, Calendar Year, Creation Date
Source	RUNCTL_TRN029
Source Records	GROUP_2483_FRA, INDIC_2483_FRA, EDIT_2483_FRA
Sorted By	2483 Indicator group, 2483 Indicator

Generating the German Internal Professional Education Status Report

The German Internal Professional Education Status report summarizes the status of employees enrolled in an internal training program.



For more information about setting up German education programs, see Tracking Professional Education Programs for German Workers.

Int. Prof. Education Status Page

Usage	Use the Int. Prof. Education Status (internal professional education status) page to report information about the current status of the steps in the Internal Education Training Programs. Only those employees who have the Intern check box selected and haven't selected Graduated in the Professional Education page are included in the report.
Navigation	Go, Develop Workforce, Administer Training (GBL), Report (Lcl), GER Int Prof Education Status
Access Requirements	Enter a Run Control ID.



Int. Prof. Education Status (internal professional education status) page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Internal Professional Education Status Report

Description	The Internal Professional Education Status (Ausbildungsverlauf) report details the current status of employees who are enrolled in an internal education training plan.
Report ID	PER107GR
Type of	Crystal

Report	
Parameters	None
Source	PRCSRUNCTL
Source Records	PERSONAL_DATA, ACOMPLISHMENTS, EE_IPE_STEPS
Sorted By	Employee ID



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Global Scenario Summary Report

The Global Scenario Summary report summarizes the training demands that have been approved in a selected scenario.



For more information about setting up global scenarios, see *Planning Training Budgets for Your Organization*.

Global Scenario Summary Page

Usage	Use this run control page to run the Global Scenario Summary report.
Object Name	RUNCTL_TRN011
Navigation	Develop Workforce, Budget Training (GBL), Report, Global Scenario Summary, Global Scenario Summary
Access Requirements	Enter a Run Control ID.

Global Scenario Summary

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) Run

Budget Period:

Business Unit: 2000 Training Budget Period

Scenario: Global Business Institute BU

Global Scenario Summary page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**, and **Business Unit**.

Select the **Budget Period** from the list of Budget Periods that you have set up on the Budget Period Table.

Select the **Scenario** from the list of scenarios that you have created.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Global Scenario Summary Report

Description	The Global Scenario Summary report provides a summary of approved training demands and the budget information for the department or business unit retrieving the information from the selected global scenario.
Report ID	TRN011
Type of Report	SQR
Parameters	Budget Period, Business Unit, Scenario
Source	RUNCTL_TRN011
Source Records	PS_BUDGET_PERIOD, PS_TRN_SCENARIO, PS_TRN_SIMULATION, PS_TRN_DEMAND
Sorted By	None



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Prerequisite Courses Report

The Prerequisites Courses report lists the courses that students need to complete before attending a selected course. You set up prerequisites on the Course Table.



For more information about setting up prerequisites, see *Setting Up Training Courses*.

Prerequisite Courses Page

Usage	Use this run control page to run the Course Description report.
Object Name	RUNCTL_TRN027
Navigation	Develop Workforce, Administer Training (GBL), Report, Prerequisite Courses, Prerequisite Courses Develop Workforce, Administer Training (USF), Report, Prerequisite Courses, Prerequisite Courses
Access Requirements	Enter a Run Control ID.

Prerequisite Courses page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Select the **Course Code** from the course codes you have set up in the Course Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Prerequisite Courses Report

Description	The Prerequisite Courses report lists the prerequisite courses for a course.
Report ID	TRN027
Type of Report	Crystal
Parameters	Course
Source	RUNCTL_TRN027
Source Records	PS_COURSE_TBL, PS_TRN_PREREQ_CRSE, PS_COURSE_TBL, PS_COST_UNIT_TBL, PS_COURSE_DESCR
Sorted By	Prerequisite Course Code



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

USF Generating the SF182 Report

The SF182 report is used by US Federal users to generate the SF 182 to request, authorize, detail estimates costs and billing, and certify training programs for employees.



For more information about entering training request data, see the Course Session Enrollment Page.

USF - SF182 – Runctl SF182 Page

Usage	Use this run control page to generate the SF182 report.
Object Name	RUNCTL_SF182
Navigation	Develop Workforce, Administer Training (USF), Report, SF182, Runctl SF182

Access Requirements	Enter a Run Control ID.
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SF182 – Runctl SF182 page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**, and **EmpIID**.

Non-EmpIID Select the **Non-EmpIID** (non-employee ID) you want to include in the report.

Request # Select the **Request #** (request number) from the list of training requests.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

USF – SF182 Report

Description	This report provides a standardized mechanism to generate SF 182 to request, authorize, detail estimates costs and billing, and certify training programs for employees.
Report ID	FGSF182
Type of Report	SQR
Parameters	Employee ID or Non-employee ID, Request #, Single or Multiple

	Requests
Source	RUNCTL_SF182



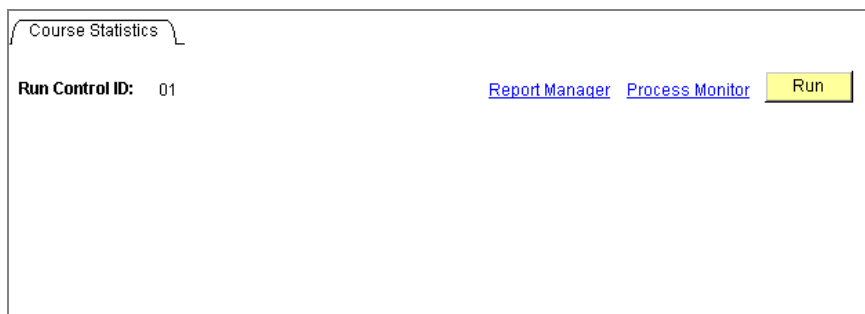
For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Statistics of EEs Enrolled Report

The Statistics of EEs Enrolled report lists the employees enrolled in courses including their company, location, and department.

Statistics of EEs Enrolled - Course Statistics Page

Usage	Use this run control page to run the Statistics of EEs Enrolled report.
Object Name	RUNCTL_TRN022
Navigation	Develop Workforce, Administer Training (GBL), Report, Statistics of EEs Enrolled, Course Statistics Develop Workforce, Administer Training (USF), Report, Statistics Evaluation, Course Statistics
Access Requirements	Enter a Run Control ID.



Statistics of EEs Enrolled - Course Statistics page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Statistics of EEs Enrolled Report

Description	The Statistics of EEs Enrolled report lists the employees enrolled in courses and lists course statistics by company, location, and department.
Report ID	TRN022
Type of Report	SQR
Parameters	None
Source	RUNCTL_TRN022
Source Records	PS_TRAINING, PS_COURSE_TBL, PS_JOB, PS_PERSONAL_DATA, PS_DEPT_TBL PS_LOCATION_TBL, PS_COMPANY_TBL
Sorted By	Company, Location, Department ID, Employee ID, Course Start Date



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Student Training History Report

The Student Training History report summarizes the training that a student has completed.



For more information about tracking student training, see Maintaining Student Training Data.

Student Training History Page

Usage	Use this run control page to run the Student Training History report.
Object Name	RUNCTL_TRN020
Navigation	Develop Workforce, Administer Training (GBL), Report, Student Training History, Student Training History

	Develop Workforce, Administer Training (USF), Report, Student Training History, Student Training History
Access Requirements	Enter a Run Control ID.

Student Training History page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**, **EmplID** (employee ID).

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Student Training History Report

Description	The Student Training History report lists the courses and sessions completed by a student.
Report ID	TRN020
Type of Report	Crystal
Parameters	EmplID
Source	RUNCTL_TRN020
Source Records	PS_TRAINING, PS_PERSONAL_DATA, PS_COURSE_TBL
Sorted By	Course Start Date



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Target Course Certifications Report

The Target Course Certifications report lists the licenses/certifications that students are awarded on successful completion of a course.



For more information about defining course goals, see *Setting Up Training Courses*.

Target Course Certifications Page

Usage	Use this run control page to run the Target Course Certifications report.
Object Name	RUNCTL_TRN016
Navigation	Develop Workforce, Administer Training (GBL), Report, Target Course Certifications, Target Course Certifications Develop Workforce, Administer Training (USF), Report, Target Course Certifications, Target Course Certifications
Access Requirements	Enter a Run Control ID.

Target Course Certifications page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Select the **Course Code** from the course codes you have set up in the Course Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Target Course Certifications Report

Description	The Target Course Certifications report lists the target license/certifications for a course
Report ID	TRN016
Type of Report	Crystal
Parameters	Course
Source	RUNCTL_TRN016
Source Records	PS_COURSE_TBL, PS_COURSE_LICENSE, PS_LIC_CERTIF_VW, PS_COST_UNIT_TBL, PS_COURSE_DESCR
Sorted By	License/Certification Code



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Target Qualifications Report

The Target Qualifications report lists the competencies that the course aims to develop or improve. You set up target qualifications on the Course Table.



For more information about setting up course goals, see Setting Up Training Courses.

Target Qualifications Page

Usage	Use this run control page to run the Target Qualifications report.
Object Name	RUNCTL_TRN028
Navigation	Develop Workforce, Administer Training (GBL), Report, Target Qualifications, Target Qualifications

	Develop Workforce, Administer Training (USF), Report, Target Qualifications, Target Qualifications
Access Requirements	Enter a Run Control ID.

Target Qualifications page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Select the **Course Code** from the course codes you have set up in the Course Table.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Target Qualifications Report

Description	The Target Qualifications report lists the target qualifications for a course.
Report ID	TRN028
Type of Report	Crystal
Parameters	Course
Source	RUNCTL_TRN028
Source Records	PS_COURSE_TBL, PS_COURSE_COMPS, PS_COMPETENCY_TBL, PS_COST_UNIT_TBL, PS_COURSE_DESCR
Sorted By	Competency



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Training Facility Schedule Report

The Training Facility Schedule report provides a schedule of all the course sessions that you have scheduled at a training facility, within a given period.



For more information about setting up Course Sessions, see *Administering Course Sessions*.

Training Facility Schedule Page

Usage	Use this run control page to run the Training Facility Schedule report.
Object Name	RUNCTL_TRN005
Navigation	Develop Workforce, Administer Training (GBL), Report, Training Facility Schedule, Training Facility Schedule Develop Workforce, Administer Training (USF), Report, Training Facility Schedule, Training Facility Schedule
Access Requirements	Enter a Run Control ID.

Training Facility Schedule page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Report Request Parameters

Facility Select the **Facility** you want the report to cover.

Courses Starting

From Date Enter the start date for the report in **From Date**.

End Date Enter the **End Date** for the report.

Click the **Run** button to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Training Facility Schedule Report

Description	The Training Facility Schedule report lists all scheduled classes at the input facility between the input dates. All sessions are listed by course start date.
Report ID	TRN005
Type of Report	Crystal
Parameters	Training Facility, From Date, and Thru Date
Source	RUNCTL_TRN005
Source Records	PS_CRSE_SESSN_TBL, PS_COURSE_TBL, PS_TRN_ROOM_TBL, PS_CRSE_SESS_DATES
Sorted By	Room Number, Course Session Start Date, Course Start Time, Course



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Training Instructor Schedule Report

The Training Instructor Schedule report lists an instructor's teaching schedule for a given period.



For more information about setting up course sessions, see *Administering Course Sessions*.

Training Instructor Schedule Page

Usage	Use the Training Instructor Schedule page to generate a report of an instructor’s teaching schedule for a given period.
Object Name	RUNCTL_TRN033
Navigation	Develop Workforce, Administer Training (GBL), Report, Training Instructor Schedule, Training Instructor Schedule
Prerequisites	Before you can run the report, the instructor must be in the Instructor Table.
Access Requirements	Enter a Run Control ID.

Training Instructor Schedule page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID**.

Instructor Select the **Instructor** from the list of valid values.

Courses Starting

From Date Enter the start date for the report in **From Date**.

Thru Date Enter the end date for the report in **Thru Date**.

Click the **Run** button to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Training Instructor Schedule Report

Description	The Training Instructor Schedule report lists the courses that an instructor is scheduled to teach during a selected period.
Report ID	TRN033
Type of Report	Crystal report
Parameters	Instructor, From Date, Thru Date
Source	RUNCTL_TRN033
Sorted By	Course Start Date



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Training Letters Report

The Training Letters report generates training letters for course sessions over a given period.



For more information about using training letters, see *Generating Administer Training Letters*.

Training Letters Page

Usage	Use the Training Letters report page to generate training letters for course sessions that you have scheduled.
Object Name	RUNCTL_TRN001
Navigation	Develop Workforce, Administer Training (GBL), Report, Training Letters, Training Letters

For a Specific Course Session

Course Code	Select the Course Code from the list of valid values.
Course Session Nbr (course session number)	Select the Course Session Nbr from the list of course sessions.

Running the Report

Click the **Run** button to run this request. From the Process Scheduler Request page, select the check box for the process that you want to run and update the Type and Format fields for the SQR Report process.

Select the Training Letters process (process type PSJob) if you want Process Scheduler to automatically run the processes sequentially. Process Scheduler runs the SQR report process to extract data, then it uses the Word macro to merge the data, and finally it runs the Application Engine process that will email training letters to students with email addresses.

If you prefer to run each process manually, select the SQR Report process first. When that has run, you run the WinWord process to merge the data, and then run the Application Engine process for emails.

For the SQR Report process, select File in the Type field and LP in the Format field.

No matter what Output Destination that you specify on Process Scheduler, the system always sends the data extract files and the form letter to a temp directory. You use Word for Windows to print the letters.



For more information about location of the letters, see Setting up the Macros for your Environment.

Training Letters Report

Description	<p>The Training Letters report involves three processes that run in the following order:</p> <p>An SQR report that extracts data from the database and creates several data extract files.</p> <p>A Microsoft Word for Windows mail merge which prints the training letters you may issue at different stages of administering course sessions: notification of course session enrollment, changes to schedules, and cancellations. The report generates letters for all students, including non-employees.</p> <p>An application engine process that emails training letters to students with an email address specified in personal data.</p>
Report ID	TRN001

Type of Report	SQR, Word for Windows
Parameters	From and Thru Date or Course Code, From and Thru Date or Course Code, Course Session Number
Source	RUNCTL_TRN001
Source Records	PS_CRSE_SESSN_TBL, PS_TRAINING, PS_CRSE_SESS_DATES, PS_PERSONAL_DATA, PS_TRN_FACIL_TBL, PS_TRN_ROOM_TBL, PS_CRS_1ST_SESS_VW, PS_RUN_CNTL_TRN001, EC PS_EMAIL_ADDRESSES
Sorted By	Letter Code, Employee ID, Non-Employee ID



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Training Plan: Costs Detail Report

The Training Plan: Costs Detail report lists the costs that are associated with a course, for each type of training cost, such as facility or vendor costs. You set up course costs on the Course Cost Table.



For more information about defining course costs, see Setting Up Default Training Costs.

Training Plan: Costs Detail Page

Usage	Use the Training Plan: Costs Detail report page to run the Training Plan: Costs detail report for a given budget period.
Object Name	RUNCTL_TRN036
Navigation	Develop Workforce, Budget Training (GBL), Rpt Lcl, FRA Trn Plan: Costs Detail, Training Plan: Cost Details
Prerequisites	Before you can run the report, you must set up default training costs for your courses.
Access Requirements	Enter a Run Control ID.

Training Plan: Cost Details	
Run Control ID: 01	Report Manager Process Monitor <input type="button" value="Run"/>
Budget Period:	<input type="text" value="K2000CALYR"/> 2000 Training Budget Period
Business Unit:	<input type="text" value="GBIBU"/> Global Business Institute BU
Department:	<input type="text"/>
Course Code:	<input type="text"/>

FRA Tm Plan: Costs Detail - Training Plan: Cost Details page

The system displays your User ID and the **Run Control ID** that you selected. These fields are for information only.

Budget Period

Select from the list of valid budget periods the **Budget Period** that you want to report to cover. When you move out of this field, the system displays the budget period description.

Business Unit

Select the **Business Unit** from the list of valid business units.

Department

If you want to limit the report to one department, select the **Department** from the list of valid departments. To include all departments in the report, leave this field blank.

Course Code

If you want to limit the report to one course, select the **Course Code** from the list of courses. To include all courses in the report, leave this field blank.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Training Plan: Cost Details Report

Description	The Training Plan: Costs Detail report lists your training costs that are associated with each course. The report details the costs for these cost types: facility, instructor, vendor, equipment, salary costs, and expenses.
Report ID	TRN036

Type of Report	SQR
Parameters	Budget Period, Business Unit, Department (optional), Course Code (optional)
Source	RUNCTL_TRN036
Source Records	PS_BUDGET_BUS_UNIT, PS_TRN_BASE_CUR, PS_CURRENCY_CD_TBL, PS_TRN_DEMAND, PS_TRN_SIMULATION, PS_TRN_SCENARIO, PS_TRN_CATALOG_TBL, PS_BUDGET_PERIOD, PS_BUS_UNIT_TBL_HR, PS_COURSE_TBL, PS_DEPT_TBL, PS_TRN_DEMAND_EE, PS_JOB_CURR_VW, PS_TRN_SML_COST_VW, PS_TRN_SML_SUM_VW, PS_TRN_LST_CRSE_VW, PS_TRN_PLN_DEM_VW
Sorted By	Department, Course Code



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Training Plan: Distribution Report

The Training Plan: Distribution report is a French-specific report that shows how the training demands you've defined for your organization are distributed by gender and professional category.

Training Plan: Distribution Page

Usage	Use the Training Plan: Distribution report page to run the Training Plan: Distribution report.
Object Name	RUNCTL_TRN035
Navigation	Develop Workforce, Budget Training (GBL), Rpt Lcl, FRA Trn Plan: Distribution, Training Plan: Distribution
Prerequisites	Before you can run this report you need to set up your training demands and specify how the demand is distributed. Set up your training demands on the General Demand and Department Demand pages.
Access Requirements	Enter a Run Control ID.

Training Plan: Distribution

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) [Run](#)

Budget Period: 2000 Training Budget Period

Business Unit: Global Business Institute BU

Department:

Course Code:

FRA Tm Plan: Distribution - Training Plan: Distribution page

The system displays your User ID and the **Run Control ID** that you selected. These fields are for information only.

Budget Period

Select from the list of valid budget periods the **Budget Period** that you want to report to cover. When you move out of this field, the system displays the budget period description.

Business Unit

Select the **Business Unit** from the list of valid business units.

Department

If you want to limit the report to one department, select the **Department** from the list of valid departments. To include all departments in the report, leave this field blank.

Course Code

If you want to limit the report to one course, select the **Course Code** from the list of courses. To include all courses in the report, leave this field blank.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Training Plan: Distribution Report

Description	The Training Plan: Distribution report details how your training demands are distributed by gender and by professional category such as, executive, manager, office worker, qualified worker, or non qualified worker.
-------------	--

Report ID	TRN035
Type of Report	SQR
Parameters	Budget Period, Business Unit, Department (optional), Course Code (optional)
Source	RUNCTL_TRN035
Source Records	PS_TRN_DEMAND, PS_TRN_SIMULATION, PS_TRN_SCENARIO, PS_TRN_CATALOG_TBL, PS_BUDGET_PERIOD, PS_BUS_UNIT_TBL_HR, PS_COURSE_TBL, PS_DEPT_TBL, PS_TRN_DEMAND_EE, PS_PERSONAL_DATA, PS_JOB_CURR_VW, PS_JOB, PS_EMPL_CTG_L1
Sorted By	Department and Course Code



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Training Plan Summary Report

The Training Plan Summary report lists all the courses that are included in your organization's training plan for a given budget period and business unit.



For more information about setting up training plans, see *Planning Training Budgets for Your Organization*.

Training Plan Summary Page

Usage	Use the Training Plan Summary page to run a Training Plan Summary report.
Object Name	RUNCTL_TRN030
Navigation	Develop Workforce, Budget Training (GBL), Report, Training Plan Summary, Training Plan Summary
Prerequisites	Before you can run this report you need to set up your training demands. Set up your training demands on the General Demand and Department Demand pages.
Access	Enter a Run Control ID.

Requirements	
Training Plan Summary	
Run Control ID: 01	Report Manager Process Monitor Run
Budget Period: <input type="text" value="K2000CALYR"/>	2000 Training Budget Period
Business Unit: <input type="text" value="US004"/>	GBI BU for US004

Training Plan Summary page

The system displays your User ID and the **Run Control ID** that you selected. These fields are for information only.

Budget Period Select from the list of valid budget periods the **Budget Period** that you want the report to cover. When you move out of this field, the system displays the budget period description.

Business Unit Select the **Business Unit** from the list of valid business units.

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Training Plan Summary Report

Description	The Training Plan Summary report lists all the courses that are included in the training plan for a given budget period and business unit. For each course, the report includes the cost of the course, the number of people approved for the course, and the total number of hours of training, which is calculated by multiplying the number of approved employees by the course duration.
Report ID	TRN030
Type of	SQR

Report	
Parameters	Budget Period, Business Unit
Source	RUNCTL_TRN030
Source Records	PS_BUDGET_BUS_UNIT, PS_TRN_BASE_CUR, PS_BUDGET_PERIOD, PS_TRN_APR_CRSE_VW, PS_TRN_SML_SUM_VW, PS_COURSE_TBL
Sorted By	



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Training Program Report

The Training Program report lists the training program you have set up for an employee.

Training Program – Course Attend. School Program Page

Usage	Use this run control page to run the Training Program report.
Object Name	RUNCTL_TRN021
Navigation	Develop Workforce, Administer Training (GBL), Report, Training Program, Course Attend. School Program Develop Workforce, Administer Training (USF), Report, Training Program, Course Attend. School Program
Access Requirements	Enter a Run Control ID.

Course Attend. School Program

Run Control ID: 01 [Report Manager](#) [Process Monitor](#)

Report Request Parameters:

EmpID: Espinosa,Carmichael

Training Program – Course Attend. School Program page

The following elements are common to multiple pages and are defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID** and **EmplID** (employee ID).

Click **Run** to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Training Program Report

Description	The Training Program report lists the training program for an employee.
Report ID	TRN021
Type of Report	SQR
Parameters	EmplID
Source	RUNCTL_TRN021
Source Records	PS_PERSONAL_DATA, PS_JOB, PS_JOB_CD_TRN_PROG, PS_TRN_PROGRM_CRSE
Sorted By	EMPL_RCD#, TRN_PROGRAM, COURSE_SEQUENCE



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

Generating the Training Schedule Report

The Training Schedule report provides a schedule of all the course sessions that you have scheduled within a given period.



For more information about setting up Course Sessions, see Administering Course Sessions.

Training Schedule Page

Usage	Use this run control page to run the Training Schedule report.
-------	--

Object Name	RUNCTL_TRN004
Navigation	Develop Workforce, Administer Training (GBL), Report, Training Schedule, Training Schedule Develop Workforce, Administer Training (USF), Report, Training Schedule, Training Schedule
Access Requirements	Enter a Run Control ID.

Training Schedule page

The following element is common to multiple pages and is defined in the preface of this PeopleBook in PeopleBooks Standard Page Element Definitions: **Run Control ID.**

Report Request Parameters

As Of Date Enter the start date for the report in **As Of Date.**

End Date Enter the **End Date** for the report.

Click the **Run** button to run the report using Process Scheduler.



For more information about Process Scheduler, see Process Scheduler.

Training Schedule Report

Description	The Training Schedule report lists all active course sessions that start between the input parameter dates. All sessions are listed in start date order.
Report ID	TRN004
Type of Report	Crystal

Parameters	From Date and Thru Date
Source	RUNCTL_TRN004
Source Records	PS_CRSE_SESSN_TBL, PS_COURSE_TBL, PS_COST_UNIT_TBL, PS_CRSE_SESS_DATES
Sorted By	Session, Course Start Date, Course Start Time



For samples of this and other reports in your application, see the PDF files published on CD-ROM with your documentation (for online users) or the *PeopleSoft HRMS Reporting Tools* (for hard copy users).

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