PeopleSoft 8.3 Human Resources PeopleBook: Administer Training

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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About the HRMS PeopleBooks

The HRMS PeopleBooks provide you with the information you will need for implementing and using PeopleSoft Human Resources Management System (HRMS) products.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in these books, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate the PeopleSoft system, much of the information in these books is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. These books expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals for HRMS PeopleBook

The individual HRMS PeopleBooks provide you with implementation and processing information for the individual HRMS products. However, there is additional, essential information describing the setup and design of each HRMS product contained in the companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook.*

The *PeopleSoft Application Fundamentals for HRMS PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the HRMS product line. Whether you are implementing a single HRMS product, some combination of products within the product line, or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals for HRMS PeopleBook*, we've included common information pertinent to all applications in the HRMS product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals for HRMS* and other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www4.peoplesoft.com/cc). We post updates, troubleshooting documentation, and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: http://www4.peoplesoft.com/cc

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.3 HRMS PeopleBooks,* SKU HR83PBR0, and *PeopleTools 8.14 PeopleBooks,* SKU PTB814R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft Internet site: http://www.peoplesoft.com.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**
Email	Email CPI at **callcenter@conpub.com**.

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields and provides standard definitions.

Field	***Definition***
Address 1, Address 2, Address 3	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
As of Date	The last date for which a report or process includes data.
Block (Bloque)	In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
City	Name of city for address.
Comment(s)	Freeflow text entry that enables you to add comments.
Company	A business organization. For US companies using PeopleSoft Payroll for North America or PeopleSoft Pension Administration, a business unit that has a unique federal Employer Identification Number (EIN) for payroll reporting purposes.

Field	*Definition*
Country	Country for address. Other address fields will be adjusted to reflect Country choice. Select a country from the list of valid values and press TAB to move through the field. The system automatically displays the appropriate address fields using the standardized address formats previously set up in the Country Table. Enter the appropriate address data in the fields that appear.
County (also **Prefecture** and **Parish**)	Name of county (prefecture/parish) for address, if applicable.
Currency Code	The 3-letter code in which the currency is specified.
Description	Freeflow text up to 36 characters that describes what you are defining.
Department	An identification code that represents an organization in a company.
Door (Puerta)	In Spanish addresses, identifies the door name or number.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Email	The email address for a person or organization.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Empl Rcd# (Employee Record Number)	A system-assigned number that indicate an employee has more than one record in the system.
Fax (also **Fax Number)**	The fax number for a person or organization.
Floor (Piso)	In Spanish addresses, identifies the floor name or number.
House	Identifies the type of house.
Initials	Initials of individual.
Language	Language spoken by employee/applicant/non-employee.
Language or Language Code	The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Last Run On	The date that a report or process was last run.
Locality	A tax location within an organization.
Name	Name of individual.

Field	***Definition***
National ID	Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code.
Number	The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.
Phone	The phone number for a person or organization.
Phone Extension	The phone extension number for a person or organization.
Phone Type	Identifies the type of phone number entered in the Telephone field. Valid values are ***Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2,*** or ***Telex.***
Post Code (also Postal)	Postal code for address.
Prefix	Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on)
Process Frequency group box	Designates the appropriate frequency in the **Process Frequency** group box: **Once** executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to **Don't Run**. **Always** executes the request every time the batch process runs. **Don't Run** ignores the request when the batch process runs.
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Regulatory Region	A regulatory region can be any region where there are specific laws and regulations that are addressed by functionality in PeopleSoft Human Resources. Many country-specific transactions are driven by regulatory requirements where Regulatory Region is used for transaction processing.
Report ID	Identifies a report.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Field	*Definition*
Run Control ID	Identifies specific run control settings for a panel.
Run Date	The date that a process was run or a report was generated.
Run Time	The time that a process was run or a report was generated.
SetID	An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units.
Short Description	Freeflow text up to 15 characters.
Stair (Escalera)	In Spanish addresses, identifies the stair name or number.
State (also **Province**)	State (Province) for address.
Status	Indicates whether a row in a table is ***Active*** or ***Inactive.***
Street Type	Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type.
Telephone (Phone)	The telephone number for a person or organization.
User ID	The system identifier for the individual who generates a transaction.

See Also

PeopleTools Development Tools: Application Designer PeopleBook, "Creating Field Definitions," Understanding Effective Dates

PeopleSoft Process Scheduler

PeopleBook Standard Group Boxes

The following group boxes and field groupings appear throughout PeopleSoft HRMS. We have documented them once here.

Entering Name Information

The following fields appear wherever you enter or display naming information:

Format Using Select the country with name format appropriate for this employee. The system will display the appropriate fields for this format in the Person Name group box.

Refresh the Name Field Click to refresh the Name field after you've edited any of the name fields. The system will refresh the name field when you save.

Person Name or Current Name

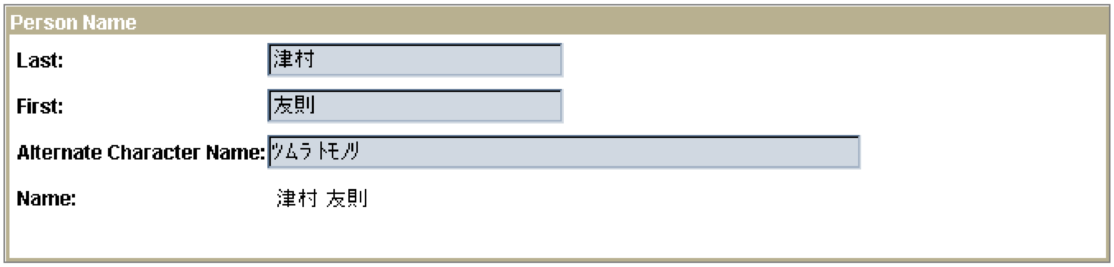
The following fields appear in the Person Name group box. You will not see all of the fields listed below at any one time. The system displays the fields necessary for the country you select in the Format Using field.

Title	Select a title. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Prefix and **Name Prefix**	Select a Prefix or Name Prefix, if applicable.
Royal Prefix	Select a Royal Prefix, if applicable.
First Name	Enter the employee's official first name.
Preferred First Name	For The Netherlands, enter the employee's preferred first name, if different from the First Name. The system will use the preferred name when you generate form letters or mailing labels for this employee.
Last Name Preference	For the Netherlands, choose this link to provide additional name information for married employees. The Last Name Preference page contains three fields: Last Name Partner, Prefix Partner and Last Name Preference.
Middle	Enter the employee's middle name, if applicable.
Last Name	Enter the employee's official last name.
Suffix	Select a suffix, if applicable.
Second Last Name	For Spanish employees, enter the second surname (mother's surname).
Alternate Character Name	Use this field to enter the employee's name using alternate characters (such as Japanese phonetic characters). **Note.** You can enter names using Japanese characters with or without a space between the surname and given name. Names using Roman alphanumeric characters require a comma delimiter. **Warning!** Be sure to select the correct character set on the Installation Table – Alternate Characters page. Using the wrong character set generates an error message.
Royal Suffix	Select the appropriate royal suffix. If you are reporting employee information under the German Duevo Directive, this field is required and must be completed according to the Duevo rules.
Name	The system displays the employee's name as it will appear in the system.

Displaying Japanese Names on Pages

Pages that display personal name fields usually display them in First Name, Last Name order. When the country is Japan, however (JPN in the Format Using field), those fields appear in the Last Name, First Name order.

Another difference is that the Name field displays “Last Name[space]First Name,” not “Last Name,First Name”; that is, a space separates the last and first names, not a comma.



Japanese name format on a page

See Also

PeopleSoft Applications Fundamentals for HRMS PeopleBook, “Setting Up PeopleSoft HRMS,” Working With Double-Byte Characters

Entering Address Information

The following fields appear in address group boxes throughout PeopleSoft HRMS. You may not see all of the fields listed below as the system displays only the fields necessary for the country in use. Determine which address fields are required for each country on the Country Table – Address Format page.

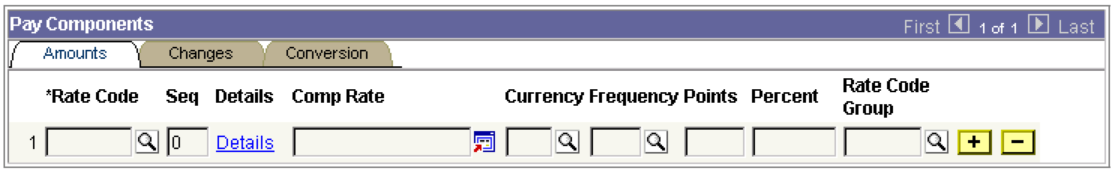
Country	Select the country with address format appropriate for this address. The system will display the appropriate fields for this format in the address group box.
Address 1, **Address 2**, **Address 3**, and **Address 4**	Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information.
City	Enter the city.
County	Enter the county, if applicable.
State (State, Province, or other)	Enter the state or province.
Postal	Enter the postal, such as zip or postal code.
Number 1, and **Number 2**	Enter the number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number.

House Type Enter the house type, if applicable.

Postal Search Click **Postal Search** to use international address formats.

Entering or Viewing Pay Components

Amounts Tab



Pay Components - Amounts

Rate Code Rate codes are IDs for pay components. The system inserts any compensation information associated with this rate code in the compensation grid.

Note. If a seniority rate code is inserted as a default value on the Job Data - Compensation page, the values for these rate codes are unavailable for entry.

Seq (sequence) The sequence number of the rate code if it is used more than once.

Details Click the **Details** button to open the Comp Rate Code Secondary Panel page.

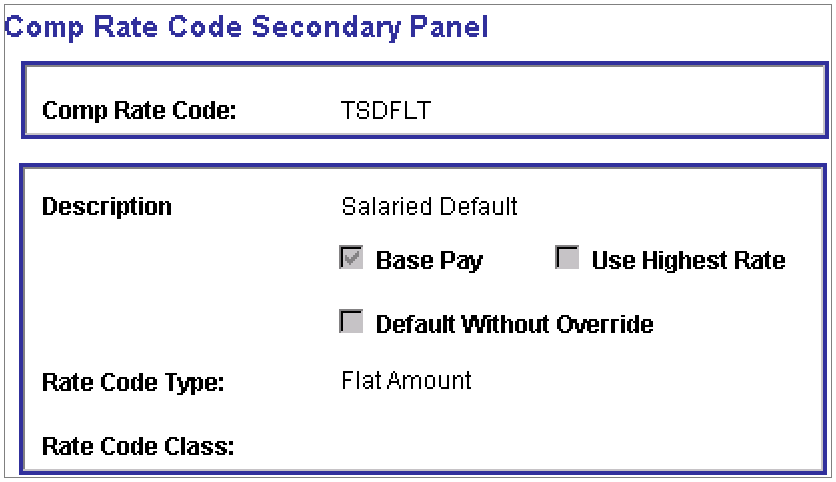
Comp Rate, (compensation rate) **Currency**, and **Frequency** The compensation rate, its currency, and the frequency (for example, annually, weekly, or hourly) the comp rate will be paid.

Apply FTE If selected, the system multiplies the rate code value by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't available for ***Percent*** rate codes.

Points The salary points associated with this rate code, if any.

Percent If the rate code rate type is ***Percent,*** the system displays the percent to be applied to the job compensation rate or to a rate code group if you are using rate code groups.

Rate Code Group A rate code group enables you to be more specific when calculating percentages based components as part of your employee compensation package.



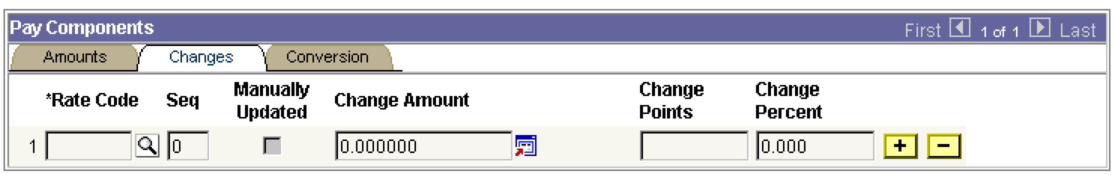
Comp Rate Code Secondary Panel

Access this page by clicking the Details link on the Amounts page. Displays additional information about the rate code.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Multiple Components of Pay," **Defining Rate Codes**

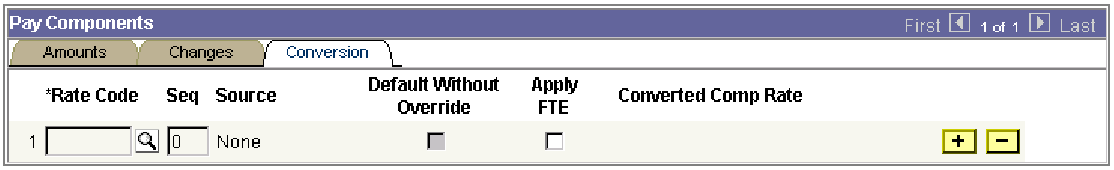
Changes Tab



Pay Components – Changes page

This page displays the change in an employee's salary.

Manually Updated	The system selects this if you have manually updated the pay components.
Change Amount	The overall change amount to this pay component rate.
Change Points	The overall change amount (in points) to this pay component, if applicable.
Change Percent	The overall percentage change to this pay component, if applicable.



Pay Components – Conversion

This page displays the conversion rates in an employee's salary.

Source The system displays the source of the rate code, such as ***Absorbing Premium***, ***Seniority Pay***, ***Job Code***, or ***Manual***.

Default Without Override Selected if the worker's compensation package cannot be manually updated on the Job Data – Compensation page.

Apply FTE Indicates if the converted rate code value will be multiplied by the FTE factor for annualization and deannualization.

Converted Comp Rate Displays the converted compensation rate for this pay component. The system converts all base pay components to the Job currency and compensation frequency.

Required Fields on Pages

When you see a field on a page with an asterisk (*) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.

Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font` Indicates PeopleCode.

Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
See Also	PeopleBooks provide cross-references under the heading “See Also.” Capitalized titles in italics indicate the title of a PeopleBook; titles in quotes indicate the title of a chapter; titles in normal font refer to sections within the PeopleBook. Here's an example: ***See Also*** *About These HRMS PeopleBooks,* **PeopleSoft 8.3 HRMS PeopleBooks Preface**

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Process Introductory Table

In the documentation, each business process in the application is accompanied by an introductory table with pertinent information about the pages used in the process.

Page	System Name	Navigation	Usage
Name of the page.	Gives the system name of the page as specified in the PeopleTools Application Designer. For example, the system name of the Detail Calendar panel is DETAIL_CALENDAR1.	Provides the path for accessing the page.	Describes how you would use the page.

USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker. Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a note or within text, if appropriate.

E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by an E&G marker. Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a note or within text, if appropriate.

Local Country Functionality

Any functionality that is specific to an individual country will be designated by the three-character ISO code for that country. For example, functionality specific to Germany would be indicated by a DEU designation at the beginning of a section heading. Most often this will appear at the beginning of a section heading (such as with this section), but the country designation might also appear in a Note or within text, if appropriate.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

About the PeopleSoft 8.3 Human Resources PeopleBook: Administer Training

This book provides you with the information you will need for implementing and using PeopleSoft Human Resources: Administer Training.

This chapter complements and extends the About the HRMS PeopleBooks section of HRMS documentation by providing specific information on how to use the documentation for Human Resources. Much of the general information you should know before you begin using PeopleSoft documentation is presented in About the HRMS PeopleBooks.

Note. We strongly recommend that you read About the HRMS PeopleBooks. In particular, the PeopleSoft Application Fundamentals section lists where you can find information about topics that apply to many PeopleSoft applications across the HRMS product line. For example, you can find information about setting up control tables, administering security, and setting language and currency preferences in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks"

PeopleBooks Standard Page Element Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions for Human Resources.

Field	***Definition***
Benefit Plan	A specific benefit offering within a plan type.
Benefit Plan Type	Also known as Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.
Benefit Program	A collection of benefit plans your company offers to a group of employees.

Field	***Definition***
Deduction	Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.
Deduction Code	The code assigned to a benefit deduction.
FSA Maximum Annual Pledge	This is the total maximum an employee can pledge to contribution to a health or dependent care flexible spending accounts during a benefit plan year.
FSA Minimum Check Amount	This is the minimum amount for which a check will be printed.
Plan Type	Also known as Benefit Plan Type, it is a two-digit code that identifies a benefit category, such as health, life, or savings.

See Also

PeopleSoft HRMS PeopleBooks Preface, "About the HRMS PeopleBooks," PeopleBooks Standard Page Element Definitions

Understanding the Documentation

Documentation for PeopleSoft Human Resources is made up of 25 business processes, each with their own book:

- Administer Company Cars
- Administer Festive Advance
- Administer Salaries for the Netherlands
- Administer Salary Packaging
- Administer Training
- Administer Variable Compensation
- Administer Workforce
- Base Benefits
- Manage Commitment Accounting
- Manage Competencies
- Manage French Public Sector
- Manage Netherlands Salary Administration
- Manage Performance
- Manage Positions

- Manage Professional Compliance
- Meet Regulatory Requirements
- Monitor Absence
- Monitor Health & Safety
- Plan Careers and Successions
- Plan Salaries
- Recruit Workforce
- Report Total Compensation
- Track Faculty Events
- Track Flexible Service
- Track Global Assignments

Human Resources Reports

The documentation for the Human Resources reports is in the reports chapter in the *PeopleSoft Application Fundamentals for HRMS PeopleBook*. There you will find information about each report, listed by module.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports"

CHAPTER 2

Overview of Administer Training

The Administer Training business process in PeopleSoft Human Resources helps you meet all of your organization's training needs.

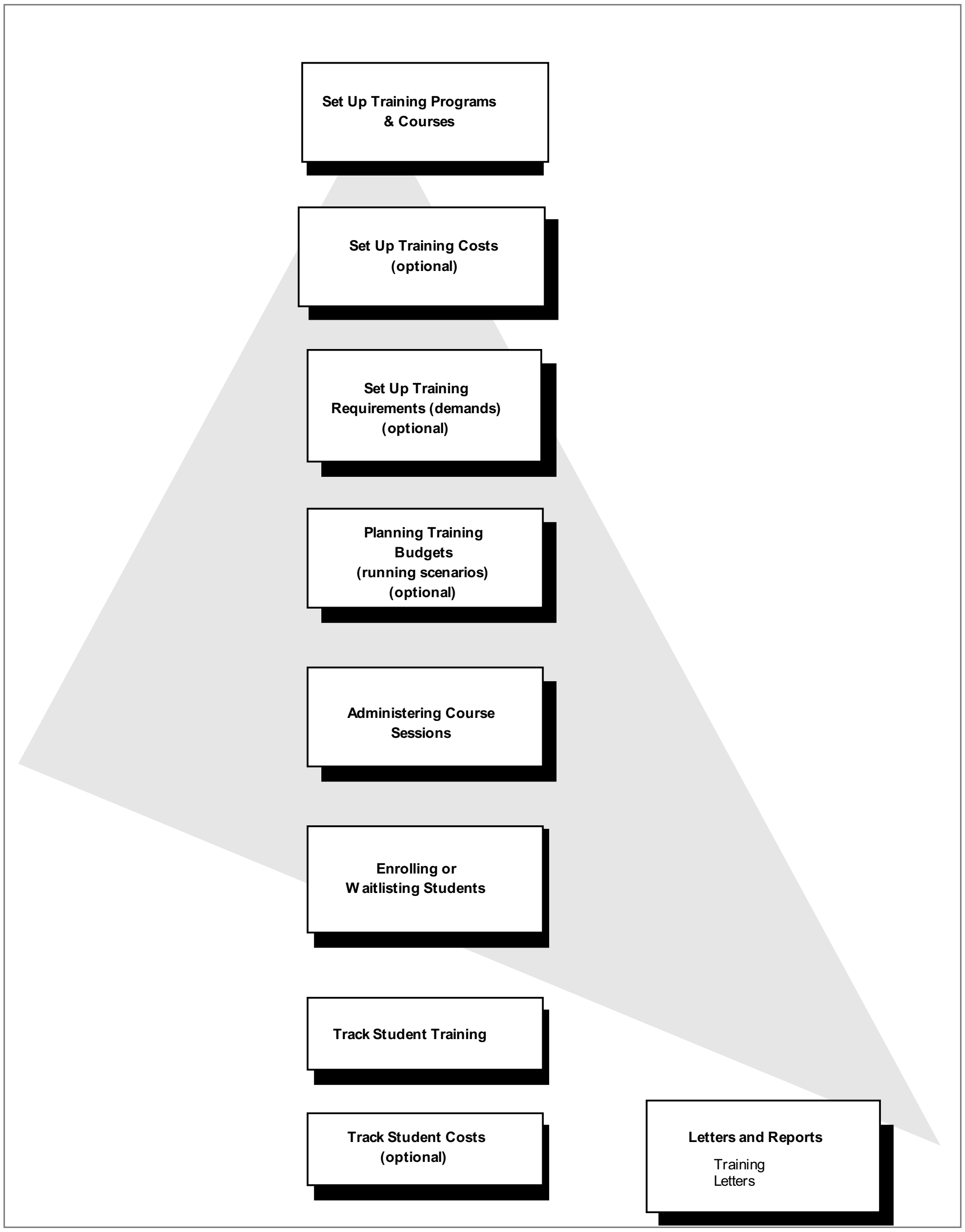
To streamline training administration, you set up standard codes in several areas (for example, information about courses, instructors, and outside vendors) and define your organization's training budget requirements. Once this data is in the system, you can easily administer course sessions and training programs.

With Administer Training, you can:

- Track the demand for training at the department or employee level.
- Create different budgeting scenarios, or models, and look at your options for meeting your organization's training demands.
- Run what-if scenarios to see how different training budgets affect your organization.
- Compare your approved training budget with your actual training costs to learn how to make your future training budgets more accurate.

Administer Training Business Process

Following is an overview of the Administer Training business process and the steps needed to set up training programs, define budgets, and administer the programs.



Administer training business process overview

Note. 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 as optional in the diagram.

CHAPTER 3

Defining Training Courses and Programs

This chapter provides an overview of training courses and programs and tells you how to:

- Set up training-related vendors and vendor contacts.
- Set up training equipment, materials, and facilities.
- Set up course instructors.
- Set up course categories.
- Set up courses.
- Set up catalogs and training programs.

Understanding Training Administration

Courses are the foundation of in-house course session administration for your organization. Before you set up course sessions, you set up the courses in your system. You use course codes to track the 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 specify a course structure. You can group courses into categories and subcategories and place them in a training catalog that you define for your organization. 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 set up training courses or work on training budgets, you define several areas that are related to training administration. These include:

- Course components (vendors, locations, training facilities, and instructors).
- Course objectives and requirements.
- Codes for tracking the education and skills that employees had before joining your organization.

You also update the qualifications and skills of employees as they enroll in and take the courses that you administer as part of the Administer Training business process.

Setting Up Training Programs

To set up training programs and track employee skills and accomplishments, you:

- Create courses in the Course Table, where you define course information and how courses are categorized in your company training catalog.
- Identify course prerequisites, target competencies (if you're using the Manage Competencies business process), and certifications.
- Specify the standard equipment and materials that are required to administer courses.

Before You Begin

Working With Tables

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

Defining Competencies and Accomplishments

When you set up training courses, you define competencies and accomplishments that are required to teach a course or that are assigned to students after successful completion of the course.

To do this, you need to set up some or all of the following tables:

- Competency Table

  Used to organize and group competencies.

- License/Certification Table

  Used to define licenses or certificates that are required to teach the course or achieved by completing the course.

- Language Table

  To track employee and non-employee language skills, set up language codes in the Language Table.

- Major Table

  Used to identify areas of study.

- Test Table

  Used to track standard tests (such as typing or aptitude tests) that you administer to job applicants or employees. 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, add the membership codes to the Membership Table.

- Degree Table

Used to identify types of degrees and years of study associated with those degrees.

Note. Federal users must set up this table.

- School Table

To use PeopleSoft Human Resources to track courses at schools and colleges, you create codes in this table.

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

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Languages," Setting Language Preferences

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments," Understanding Accomplishments and Competencies

Setting Up Vendors and Vendor Contacts

You'll probably outsource some of the services that you use to run training course sessions. For example, you might use caterers to provide meals for attendees.

In the Vendor Table component, you enter information about the vendors that you use frequently. Then you associate external instructors with those vendors.

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 you need to generate the French Training Report 2483.

This section describes how to:

- Enter basic information about a vendor.
- Enter the vendor's address and the default cost charged by the vendor.
- Enter the details of a vendor contact.
- Enter the address of a vendor contact.

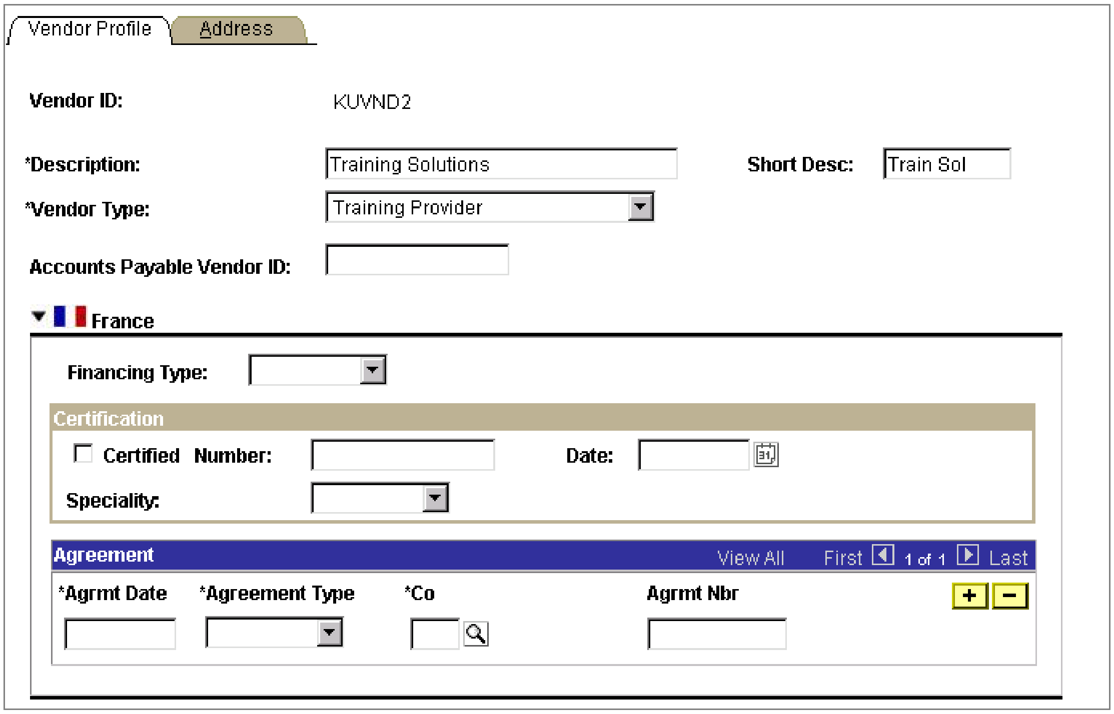
Pages Used to Set Up Vendors and Vendor Contacts

Page Name	***Object Name***	***Navigation***	***Usage***
Vendor Table - Vendor Profile	TRN_VENDR1_TBL_GBL	Develop Workforce, Administer Training (GBL), Setup, Vendor Table, Vendor Profile	Enter basic information about a vendor.
Vendor Table - Address	TRN_VENDR2_TBL_GBL	Develop Workforce, Administer Training (GBL), Setup, Vendor Table, Address	Enter the vendor's address and the default cost charged by the vendor.
Vendor Table - Vendor Contact Phone	TRN_VNDR_CNTCT_TB1	Develop Workforce, Administer Training (GBL), Setup, Vendor Contact Table, Vendor Contact Phone	Enter the details of a vendor contact.
Vendor Contact Address	TRN_VNDR_CNTCT_TB2	Develop Workforce, Administer Training (GBL), Setup, Vendor Contact Table, Vendor Contact Address	Enter the address of a vendor contact.

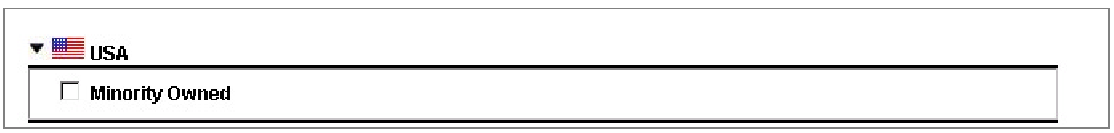
Note. These components are accessible through the alternate navigation Develop Workforce, Budget Training (GBL), Setup, Vendor Table and Vendor Contact Table.

Entering Basic Information About a Vendor

Access the Vendor Table - Vendor Profile page.



Vendor Table - Vendor Profile page (1 of 2)



Vendor Table - Vendor Profile page (2 of 2)

Vendor Type

Select a vendor type from the available options.

Accounts Payable Vendor ID

Enter an Accounts Payable vendor ID; this field is optional.

(FRA) France

Financing Type

If the vendor type is ***Financing Fund,*** select the financing type that your company will use. Values are ***FAF*** and ***FONGECIF*** *(Fonds de Gestion du Conge Individuel de Formation).*

In France, where professional training is mandatory (depending 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).

Certification

Enter the provider's certification details in this group box if the **Vendor Type** is ***Training Provider.***

Certified	Select if the government certifies the provider.
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.

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 list: ***Simple, Annual,*** or ***Multi-ann*** (multi-annual).
Co (company)	Select the provider name from the vendors that you defined in the Vendor Table.
Agrmt Nbr (agreement number)	Enter the number of the agreement between your organization and the training provider.

USA

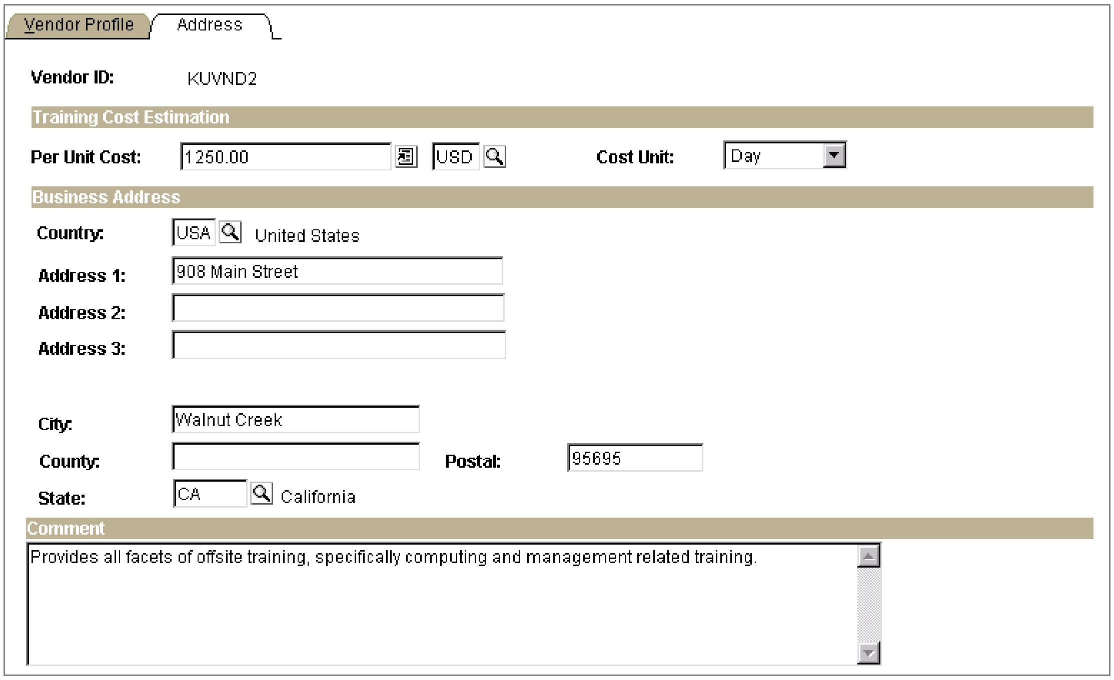
Minority Owned	Select if a member of an ethnic minority owns the vendor's business.

See Also

"Producing the French Training Report 2483"

Entering a Vendor's Address

Access the Vendor Table - Address page.



Vendor Table - Address page

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.

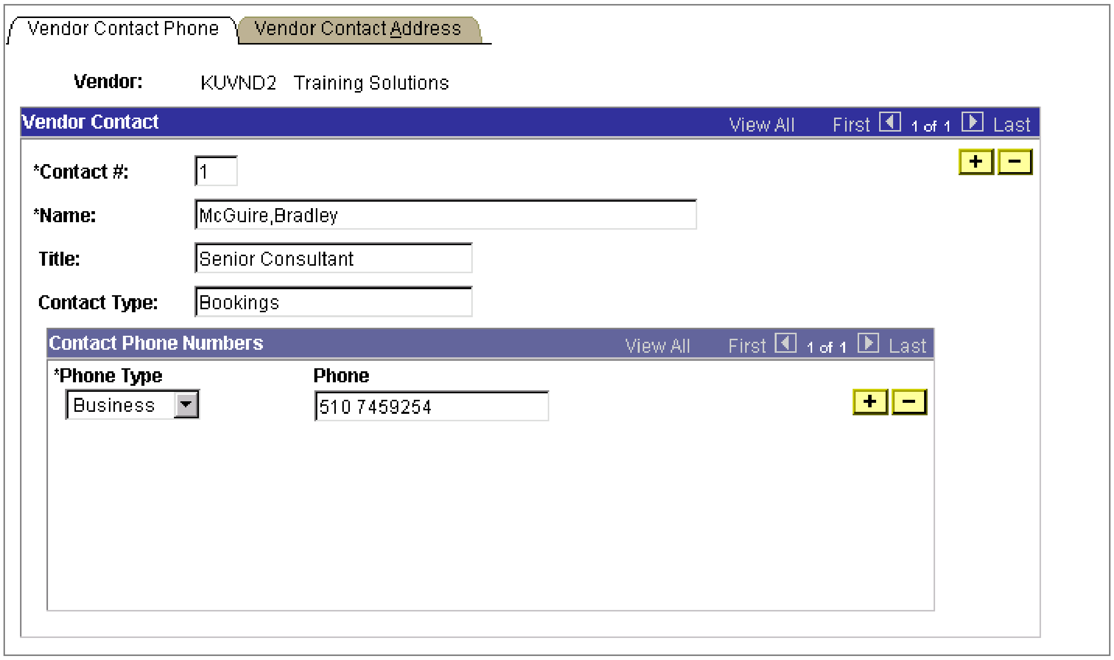
See Also

"Tracking Training Costs," Understanding Training Cost Tracking

PeopleSoft Application Fundamentals PeopleBook, "Setting Up Your HRMS System," Administering Country Codes

Entering Details of a Vendor Contact

Access the Vendor Contact Table - Vendor Contact Phone page.



Vendor Contact Table - Vendor Contact Phone page

Vendor Contact

Contact # (contact number) The system assigns a sequential number to each contact that you add. You can renumber the contacts.

Contact Phone Numbers

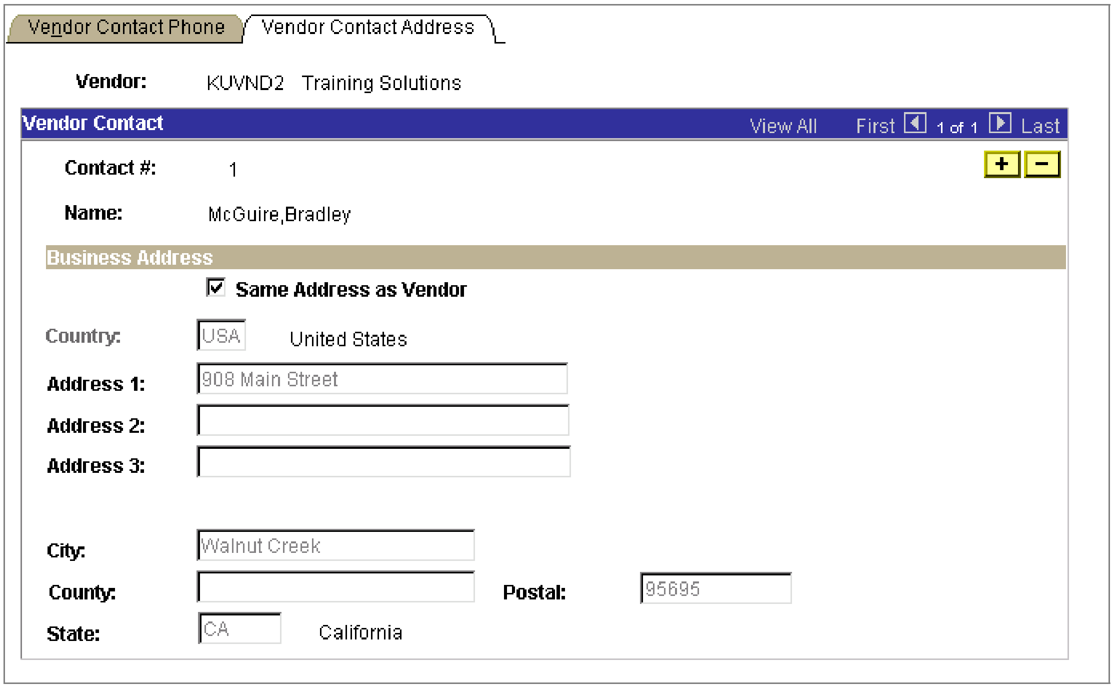
Add a row for each number, such as a business telephone number, fax number, or cellular phone number.

Phone Type Select the type of number from the list.

Phone Enter the phone number.

Entering the Address of a Vendor Contact

Access the Vendor Contact Table - Vendor Contact Address page.



Vendor Contact Table - Vendor Contact Address page

Same Address as Vendor

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

When you change the vendor address on the Vendor Table - Address page, the system updates the business address on this page for each contact for which this check box is selected.

Setting Up Training Equipment, Materials, and Facilities

Using the pages in this section, you define the equipment and materials that are needed for a course and identify the location of the course.

This section describes how to:

- Identify the equipment and materials that are used for training courses.
- Enter the address of each training facility.
- Enter the contact name and phone number and the equipment that is available at the training facility.
- Track information about each training room in a training facility.
- Enter directions to a training facility.

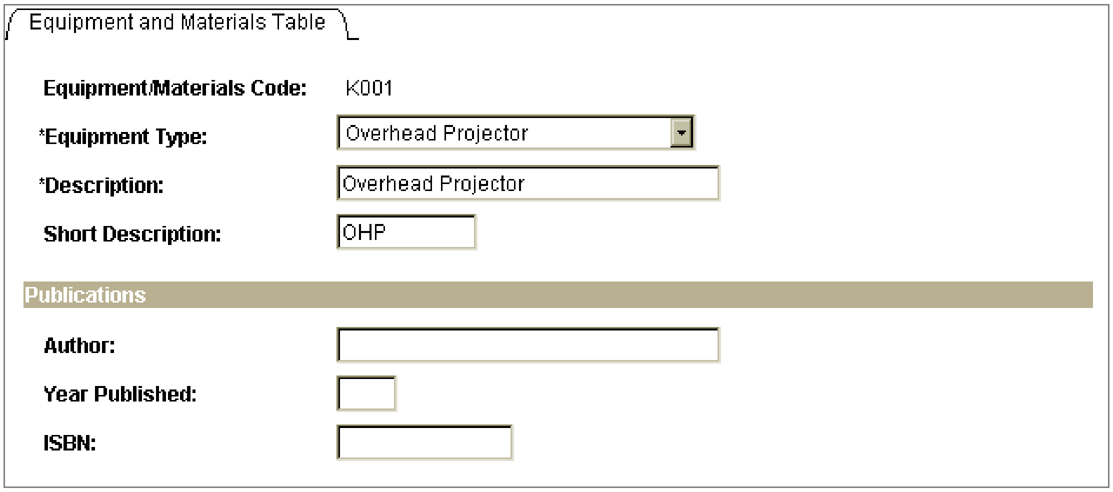
Pages Used to Set Up Training Equipment, Materials, and Facilities

Page Name	***Object Name***	***Navigation***	***Usage***
Equipment and Materials Table	TRN_EQUIP_TABLE	Develop Workforce, Administer Training (GBL), Setup, Equipment and Materials Table, Equipment and Materials Table Develop Workforce, Budget Training (GBL), Setup, Equipment and Materials Table, Equipment and Materials Table	Identify the equipment and materials used for training courses. Use these codes for listing the equipment that is required to administer course sessions in-house. To ensure that all necessary equipment is available where the courses will take place, you associate equipment and materials with specific training facilities.
Training Facility Table - Address	TRN_FACILITY_TBL1	Develop Workforce, Administer Training (GBL), Setup, Training Facility Table, Address	Record the address of each training facility that your organization uses.
Training Facility Table - Contacts and Equipment	TRN_FACILITY_TBL2	Develop Workforce, Administer Training (GBL), Setup, Training Facility Table, Contacts and Equipment	Enter the contact name and telephone number for the training facility and list the available equipment.
Training Facility Table - Training Rooms	TRN_FACILITY_TBL4	Develop Workforce, Administer Training (GBL), Setup, Training Facility Table, Training Rooms	Track information about each training room at a training facility: location, capacity, cost, and the fixed equipment that is available in the room.
Training Facility Table - Directions	TRN_FACILITY_TBL3	Develop Workforce, Administer Training (GBL), Setup, Training Facility Table, Directions	Enter directions to a training facility.

Note. The Training Facility Table component is accessible through the alternate navigation Develop Workforce, Budget Training (GBL), Setup, Training Facility Table.

Identifying Equipment and Materials

Access the Equipment and Materials Table page.



Equipment and Materials Table page

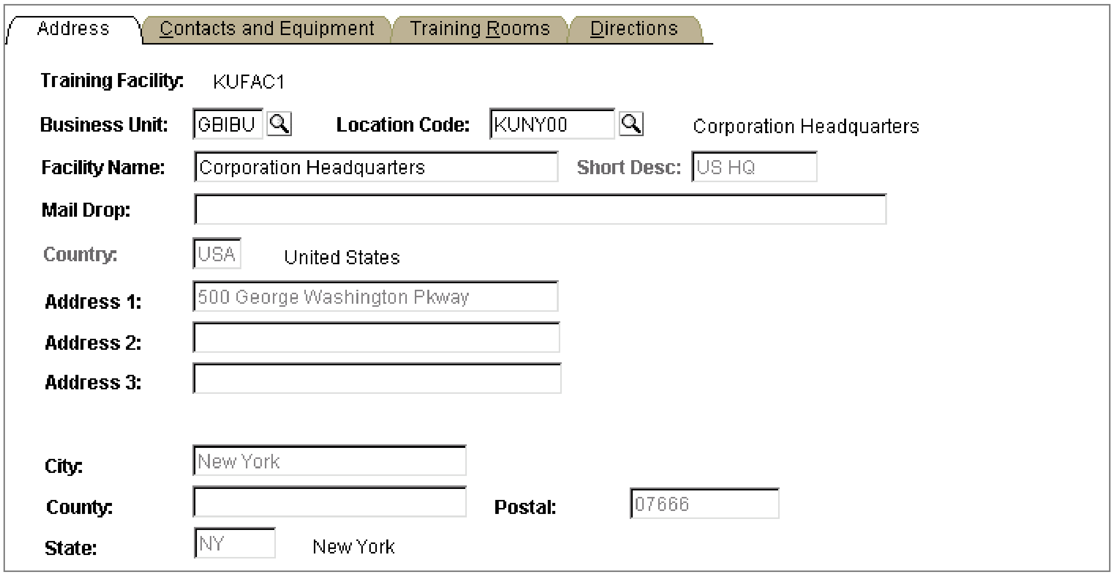
Equipment Type	Select from the available options.

Publications

Author	Enter the author's name.
Year Published	Enter the year published.
ISBN	Enter the ISBN.

Entering the Address of a Training Facility

Access the Training Facility Table - Address page.



Training Facility Table - Address page

Training facilities can be on company premises or off-site at an external vendor's facility.

Business Unit
Select the business unit that is 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 that you selected.

If you change the business unit after entering a location code, and the location code isn't tied to this business unit, the system displays a warning message and clears this field.

If the training facility is off-site, leave this field blank.

Facility Name
If you didn't enter a location code, enter the facility's name and address.

If you entered a location code, the system completes this field and makes it unavailable for entry.

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

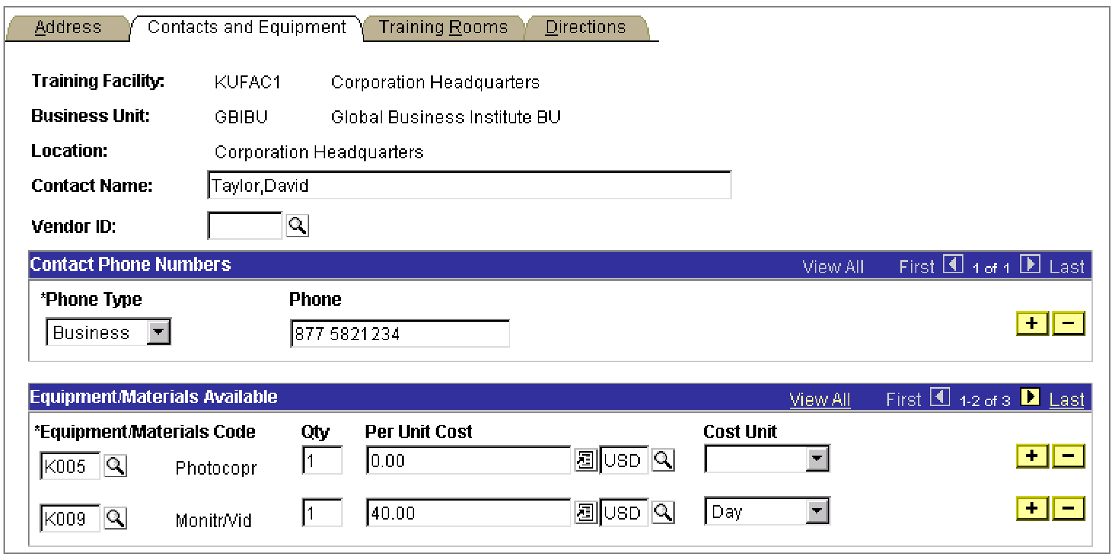
Note. The mail drop isn't part of the normal address and isn't included in the standard training letters that are supplied by PeopleSoft.

Country
If you entered a location code, the system completes this field. If you didn't enter a location code, select a country from the list.

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

Entering Contact and Equipment Information

Access the Training Facility Table - Contacts and Equipment page.



Training Facility Table - Contacts and Equipment page

Note. The cost information on this page isn't required. Costs for training facilities are required only when you are working with Training Budgets.

Contact Name Enter a contact name for the training facility.

Vendor ID If the contact works for a vendor, select the vendor ID.

Contact Phone Numbers

Phone Type Select a phone type from the list.

Phone Enter the phone number.

Equipment/Materials Available

List all equipment that is shared between training rooms. Don't include fixed equipment that is tied to a particular training room.

Equipment/Materials Code Select a code from the list of values. When you move out of this field, the system displays the equipment name.

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

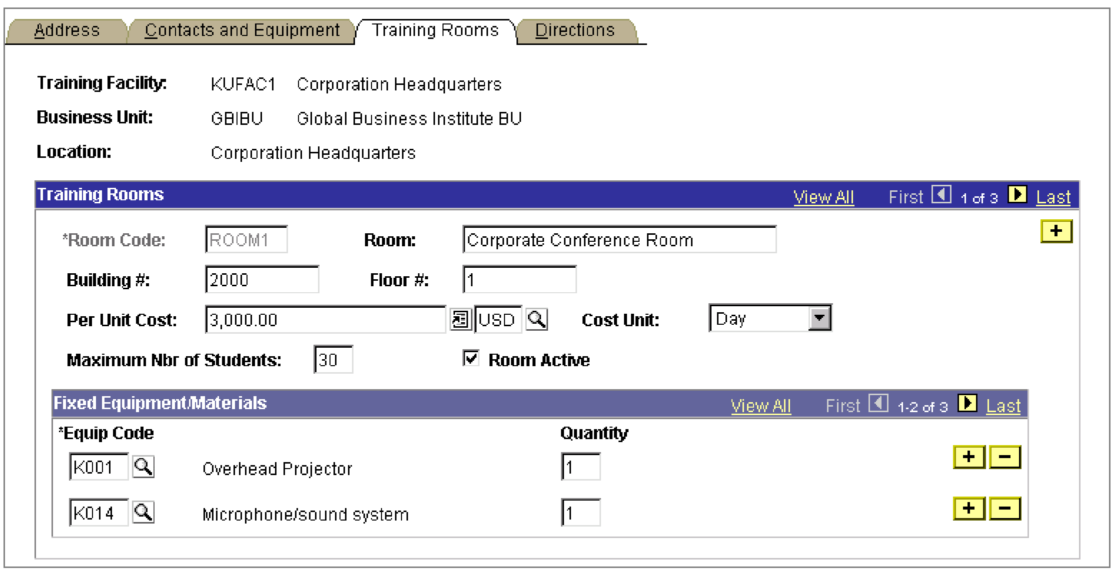
Per Unit Cost — Enter a per-unit cost for each item. This field is optional, but it's helpful as a reference, especially for comparing facility site costs.

In the field next to **Per Unit Cost,** select the currency code for the item. The default currency code is from the value that is specified in the EXCHNG_TO_CURRENCY field in the BUS_UNIT_OPR_HR record. You can override this value.

Cost Unit — Select a cost unit that is associated with the item.

Tracking Training Room Information

Access the Training Facility Table - Training Rooms page.



Training Facility Table - Training Rooms page

Note. The cost information on this page isn't required. Costs for training facilities are required only when you are working with Budget Training.

Training Rooms

Room Code — Enter a room code for the room. Each room in 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 that is associated with the per-unit cost.

Maximum Nbr of Students (maximum number of students) — Enter the maximum number 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 this 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

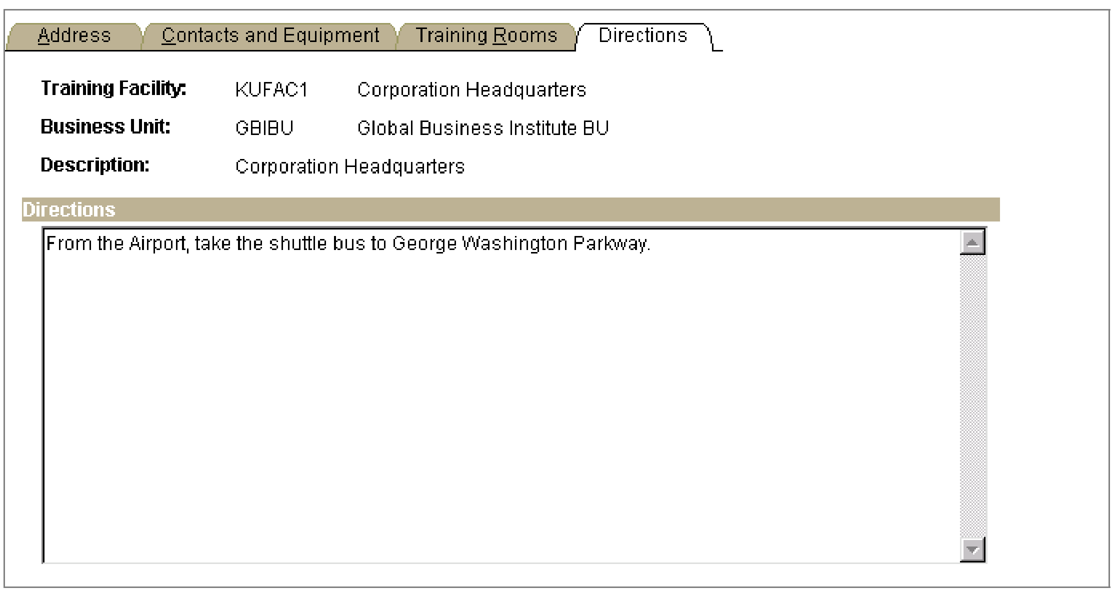
Equip Code (equipment code) — Select a code for each item in the training room. Include only fixed equipment that is tied to the room.

When you move out of this field, the system displays the equipment name.

Quantity — Enter the quantity of each item in the training room.

Entering Directions to a Training Facility

Access the Training Facility Table - Directions page.



Training Facility Table - Directions page

Directions

Enter directions to the facility. You can use those directions in the confirmation form letters that you send to students.

See Also

“Enrolling or Waitlisting Students,” Administering Training Letters

Setting Up Course Instructors

To help you set up course sessions and choose the most qualified instructors, use the Instructor Table component to:

- Enter information about internal and external instructors.
- Track instructor costs and areas of expertise.
- Compare instructor requirements for a course against an instructor’s competency profile.

This section describes how to:

- Add an instructor to the Instructor Table.
- Define the courses that the instructor is qualified to teach.
- View the instructor’s competencies.
- View the instructor’s accomplishments.

Pages Used to Set Up Course Instructors

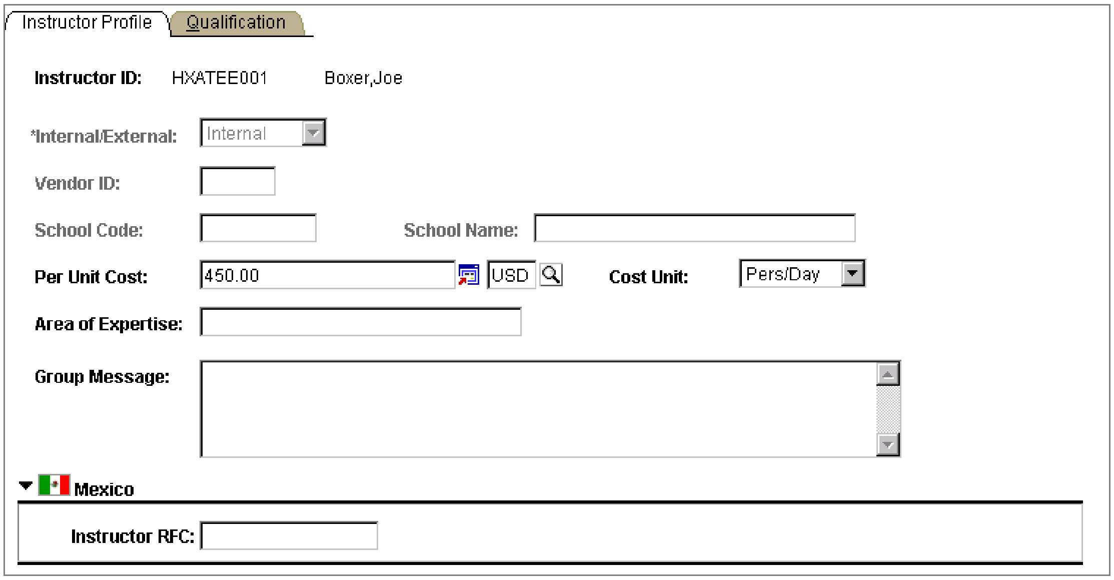
Page Name	*Object Name*	*Navigation*	*Usage*
Instructor Table - Instructor Profile	TRN_INSTRUCTR_TBL1	Develop Workforce, Administer Training (GBL), Setup, Instructor Table, Instructor Profile	Add an instructor to the Instructor Table.
Instructor Table - Qualification	TRN_INSTRUCTR_TBL2	Develop Workforce, Administer Training (GBL), Setup, Instructor Table, Qualification	Define the courses that an instructor is qualified to teach.

Page Name	***Object Name***	***Navigation***	***Usage***
Instructor Table - Qualification - Matching Competencies	TRN_MTCH_CMPS_SEC	Develop Workforce, Administer Training (GBL), Setup, Instructor Table, Qualification Click the Matching Competencies link on the Instructor Table - Qualification page.	View the instructor's competencies, along with the course requirements. For some courses, you may not need the instructor to fulfill all the requirements. This page helps you determine the instructor's suitability to teach the course.
Instructor Table - Qualification - Matching Accomplishments	TRN_MTCH_ACPS_SEC	Develop Workforce, Administer Training (GBL), Setup, Instructor Table, Qualification Click the Matching Accomplishments link on the Instructor Table - Qualification page.	View the instructor's accomplishments, along with the course requirements. For some courses, you may not need the instructor to fulfill all the requirements. This page helps you determine the instructor's suitability to teach the course.

Note. The Instructor Table component is accessible through the alternate navigation Develop Workforce, Budget Training (GBL), Setup, Instructor Table.

Adding an Instructor

Access the Instructor Table - Instructor Profile page.



Instructor Table - Instructor Profile page

You can add only existing employees and non-employees to the Instructor Table.

To add a new external instructor, first add the instructor as a non-employee, using the Add Non-Employee component on the Administer Workforce menu.

Note. The cost information on this page isn't required. Costs for training facilities are required only when you are working with Training Budgets.

Internal/External

System-displayed. The system populates this field as follows:

Internal: Instructor is an employee.

External: Instructor is a non-employee.

Vendor ID

Select a vendor ID if the instructor works for a vendor that you added to the Vendor Table. If the instructor is ***Internal,*** this field is unavailable for entry.

School Code

If the instructor works at a school that you added to the School Table, select a school code. When you move out of the field, the system enters the **School Name** field. To enter a school that isn't in the School Table, leave **School Code** blank.

If the instructor is ***Internal,*** this field is unavailable for entry.

School Name

If the instructor works at a school that isn't in the School Table, enter the school name.

The **School Name** field is unavailable for entry if the instructor is ***Internal.***

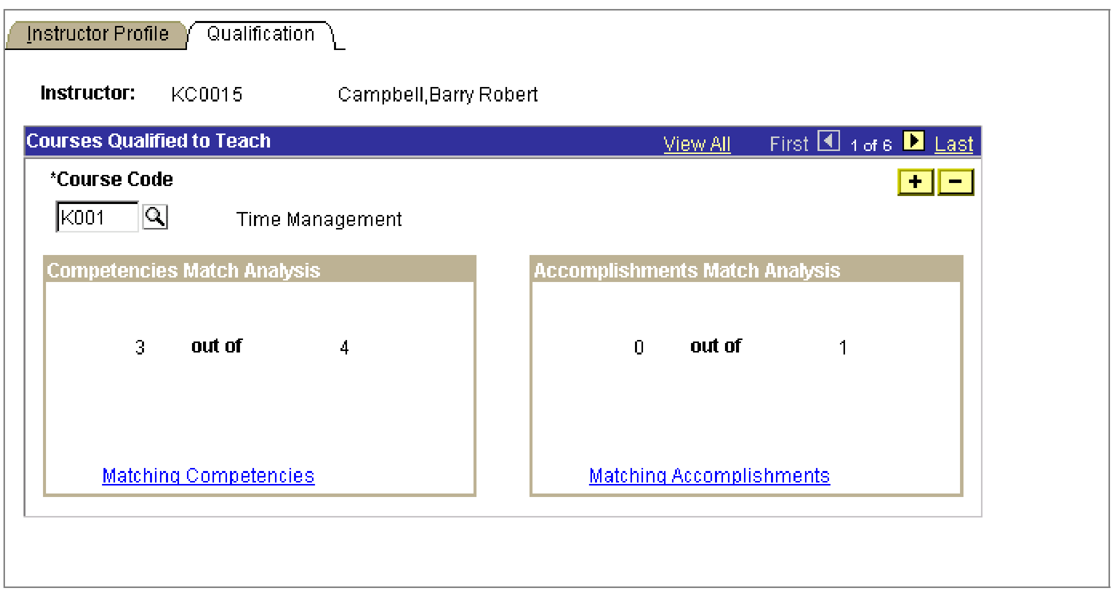
Per Unit Cost	Enter the per-unit cost for this instructor. This value is used as the default instructor cost in the course cost setup. If the instructor is ***Internal,*** the cost for the instructor appears as the default from the Employee Training Cost Page in the Budget Training menu.
Cost Unit	Select a cost unit for the instructor's time from the available options.
Area of Expertise	Enter a brief description of the instructor's area of expertise.
Description	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 Instructor Table – Qualification page.

(MEX) Mexico

Instructor RFC	Enter the RFC for the instructor.

Defining Courses That an Instructor Is Qualified to Teach

Access the Instructor Table - Qualification page.



Instructor Table - Qualification page

Courses Qualified to Teach

Course Code	Select a course code from the list of 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

This 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*.**

Matching Competencies	Click to display the Instructor Table – **Viewing an Instructor's Competencies page**. This page lists all the competencies that are required by the course alongside the instructor's competencies.

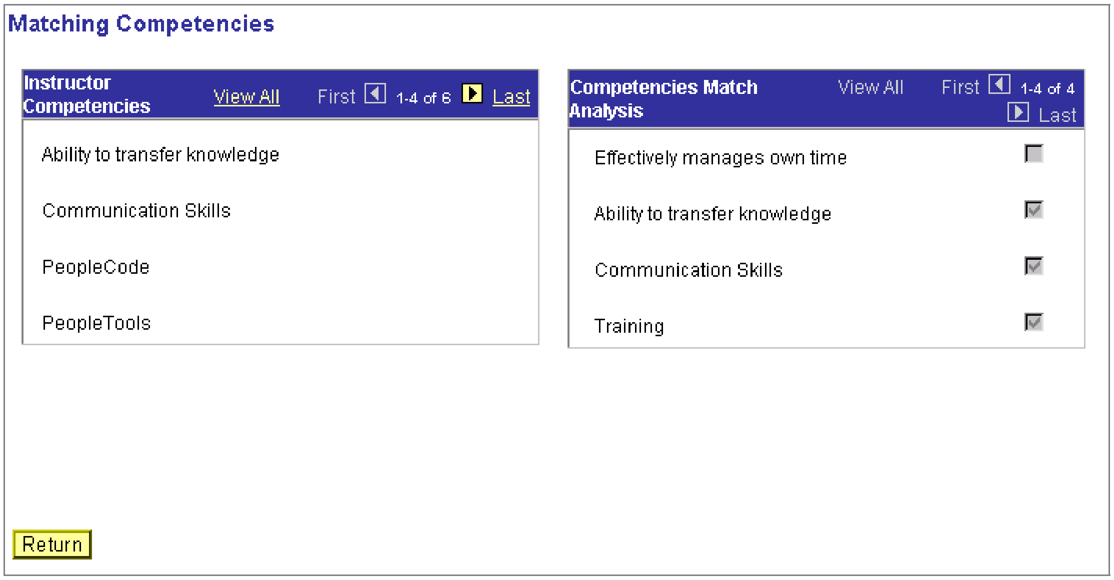
Accomplishments Match Analysis

This 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*.**

Matching Accomplishments	Click to display the Instructor Table – Qualification – Matching Accomplishments page. This page lists the accomplishments required by the course alongside the instructor's accomplishments.

Viewing an Instructor's Competencies

Access the Instructor Table - Qualification - Matching Competencies page.



Instructor Table - Qualification - Matching Competencies page

Instructor Competencies

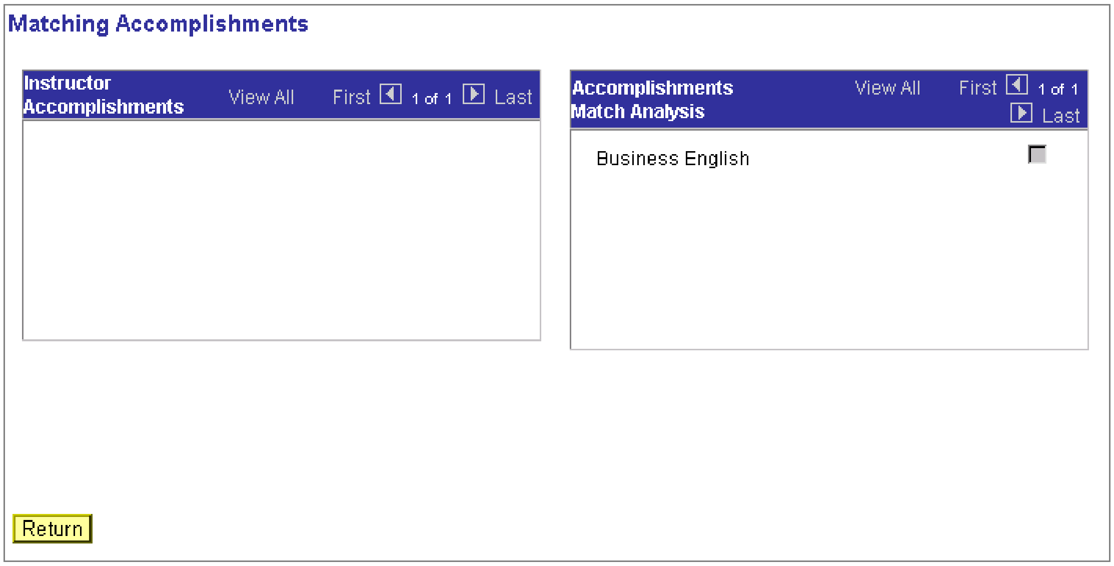
This group box lists the competencies that are assigned to the instructor on the Competencies - Competency Assignment page.

Competencies Match Analysis

This group box lists the competencies that are required to teach the course. Set up these course requirements on the Course Table – Required Instr Comps/Accomps Page (course table - required instructor competencies and accomplishments page). If the competency is included in the instructor's profile, the check box is selected.

Viewing an Instructor's Accomplishments

Access the Instructor Table - Qualification - Matching Accomplishments page.



Qualification: Matching Accomplishments page

Instructor Accomplishments

This group box lists the instructor's accomplishments. These are set up in the Competencies tables through the Manage Competencies, Setup menu.

Accomplishments Match Analysis

This 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 (course table - required instructor competencies and accomplishments page). If the accomplishment is included in the instructor's profile, the check box is selected.

See Also

"Administering Course Sessions"

Setting Up Course Categories

Courses can cover a wide range of subjects, from administrative to technical and from management to personal. To help organize training courses, you set up categories and subcategories on the Category/Subcategory -Category Table page. When you create new courses in the Course Table you associate the course with a category and subcategory.

This section describes how to define course categories.

Overview of Categories and Subcategories

To be clear about courses and the scope of each course, you can classify each course by category. You can further classify categories into subcategories so that you can define more discrete components of training, if needed by your employees. This structure of courses, categories, and subcategories provides an organizational approach to training.

The following example shows how PeopleTools courses 1 and 2 have been classified as Technical courses in the PeopleSoft Human Resources category. Likewise, Supervisory Skills and Performance Reviews courses are classified as Administrative courses in the same category. All courses have been added to the catalog.

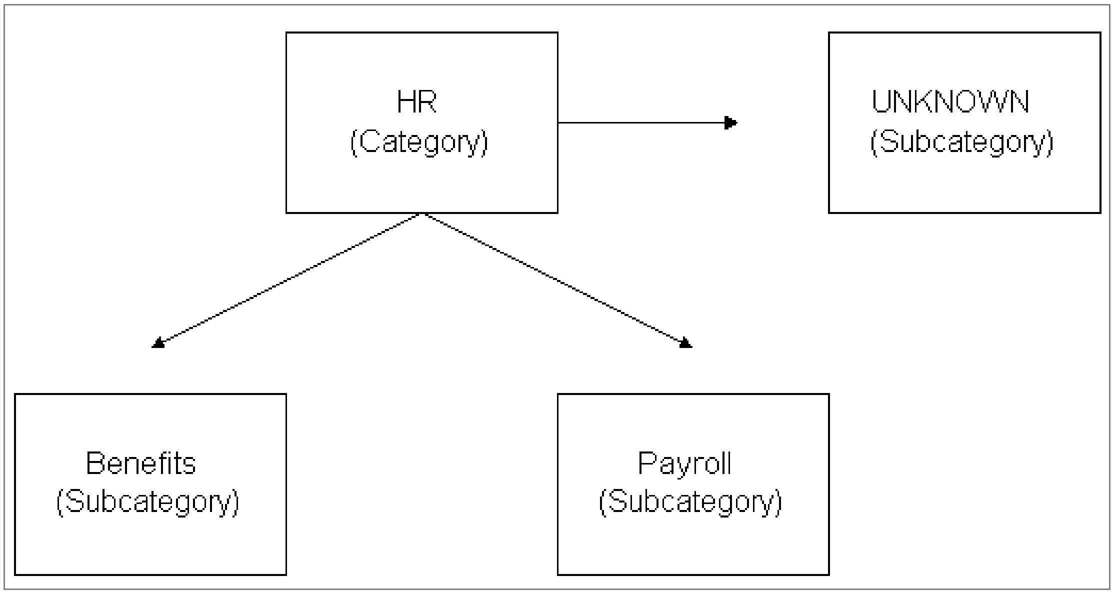
Category	***Subcategory***	***Courses***	***Catalog Status***
Human Resources	Technical	PeopleTools 1	Active
		PeopleTools 2	Active
	Administrative	Supervisory Skills	Active
		Performance Reviews	Active

When you create a new category, the system uses the default, subcategory code value ***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.

Note. Every category that you define has 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 that you see as you associate specific course codes with categories and subcategories in the Administer Training business process:



Hierarchical structure of categories and subcategories

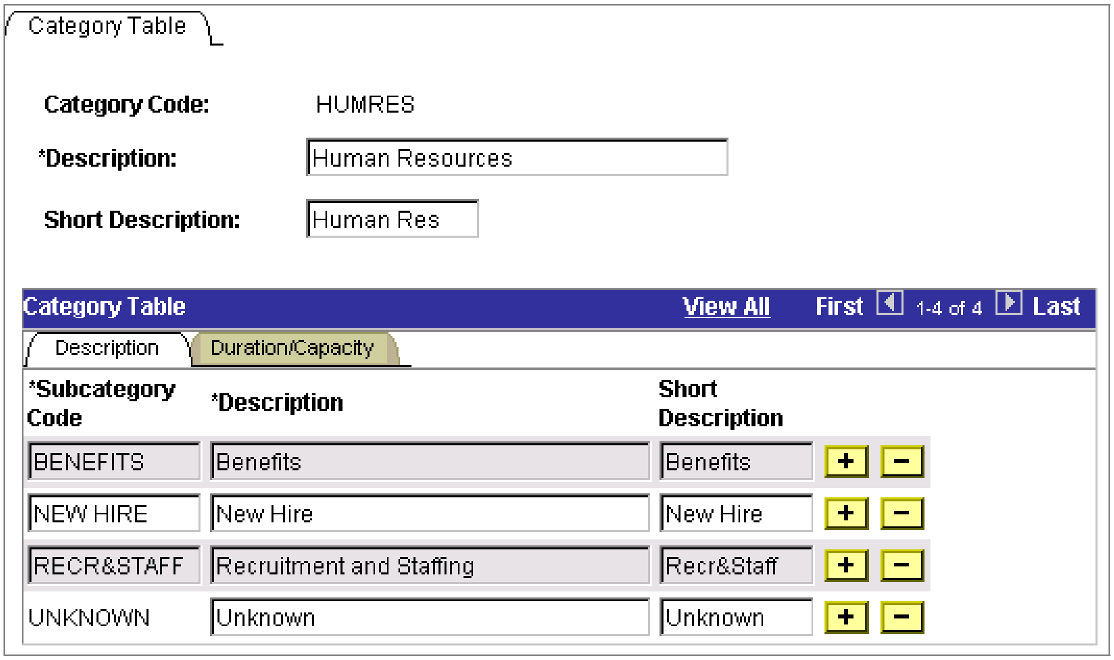
You can enter values to default for the Unknown subcategory into other subcategories. For example, in the diagram shown here, the values entered into the Unknown subcategory in the HR Category can be set to default into the Benefits and Payroll subcategories.

Page Used to Set Up Course Categories

Page Name	***Object Name***	***Navigation***	***Usage***
Category/Subcategory - Category Table	TRN_CATEGORY_TABLE	Develop Workforce, Administer Training (GBL), Setup, Category / Subcategory, Category Table Develop Workforce, Budget Training (GBL), Setup, Category / Subcategory, Category Table	Define the course categories that form your training catalog.

Defining Course Categories

Access the Category/Subcategory - Category Table page.



Category/Subcategory - Category Table page

Description Tab

Enter the **Subcategory Code** and **Description** fields. Add a row for each subcategory that you want to add to the category.

Duration/Capacity Tab

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

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

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

See Also

Setting Up Your Training Catalog and Training Programs

Setting Up Training Courses

To view a list of standard courses that are already defined in the system, generate the Course Table report. This report shows all available courses and describes each course, including its location and duration.

This section describes how to:

- Define general course information.
- Define instructor competencies and accomplishments
- Designate prerequisites for courses
- Define equipment and materials that are required for the course.
- Specify how classes are to be classified in the system.
- Enter more information about the course content, target audience, or course agenda.

Pages Used to Set Up Training Courses

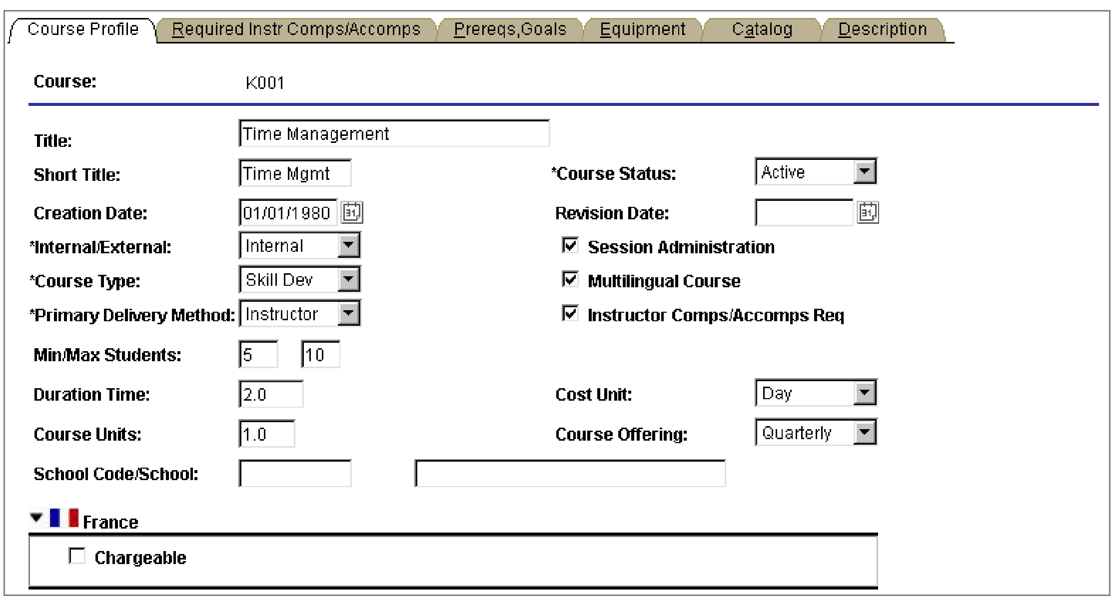
Page Name	***Object Name***	***Navigation***	***Usage***
Course Table - Course Profile	COURSE_TABLE1_GBL	Develop Workforce, Administer Training (GBL), Setup, Course Table, Course Profile	Define general course information.
Required Instr Comps/Accomps	COURSE_TABLE6	Develop Workforce, Administer Training (GBL), Setup, Course Table, Course Profile	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.
Course Table - Prereqs, Goals (course table - prerequisites, goals)	COURSE_TABLE2	Develop Workforce, Administer Training (GBL), Setup, Course Table, Course Profile	Specify the courses that a student must complete before taking this course, and specify target skills and certifications. Before using this page, define prerequisite courses and target competencies on the Competencies Table.

Page Name	***Object Name***	***Navigation***	***Usage***
Course Table - Equipment	COURSE_TABLE3	Develop Workforce, Administer Training (GBL), Setup, Course Table, Course Profile	Define the equipment and materials that are required for the course. Add this information only for courses that you administer in-house.
Course Table - Catalog	COURSE_TABLE4	Develop Workforce, Administer Training (GBL), Setup, Course Table, Course Profile	Specify how the courses are to be classified in the system.
Course Table - Description	COURSE_TABLES	Develop Workforce, Administer Training (GBL), Setup, Course Table, Course Profile	Enter additional information about the course content, target audience, or agenda.

Note. The Course Table component is accessible through the alternate navigations Develop Workforce, Budget Training (GBL), Setup, Course Table and Develop Workforce, Manage Competencies (GBL), Setup, Course Table.

Defining General Course Information

Access the Course Table - Course Profile page.



Course Table - Course Profile page

Title	Enter the title of the course.
Short Title	Enter an abbreviated course title.
Course Status	Select a status from the list of options: ***Active:*** The course is currently available. You can set up a course session only if the course is ***Active*** (the default). ***Inactive:*** The course is no longer available. You can't set up a session for a course that is ***Inactive.*** ***Proposed:*** The course is not yet available. You can't set up a session for a course that is ***Proposed.***
Creation Date	If you're setting up a new course, the system date (usually today's date) appears by default. You can change it.
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 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 ***Internal*** and ***External*** courses. **Note.** If you can't find a session when you're administering course sessions in the Administer Training business process, check to see if the Session Administration check box on the Course Table 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 from the list of options: ***Contin Ed:*** Continuing education. ***Comp check:*** Competency check. ***Functional*** ***Mgmt Devel:*** Management development. ***Skill Dev:*** Skill development. ***Supv Skill:*** Supervisory skills. ***Technical*** Use this field to categorize your courses. This field is for information only and doesn't affect the way that you administer the course in PeopleSoft Human Resources.

Multilingual Course	Select if the course is offered in multiple languages. This check box is available if you selected the **Session Administration** check box.
Primary Delivery Method	Select from the list of options: ***Audio:*** For audio training, such as language tapes. ***Computer:*** For computer-based training. ***Instructor*** (the default value): For instructor-led courses. ***On-the-Job:*** For on-the-job training. ***Video:*** For video-based training. ***Workbook:*** For self-taught courses with workbooks.
Instructor Comps/Accomps Req (instructor competencies and accomplishments required)	Select to define a set of instructor competencies and accomplishments for the course. This check box is unavailable for entry if the **Primary Delivery Method** value is other than ***Instructor.***
Min/Max Students	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 (the unit in which duration time is measured): ***Hour*** ***Day*** ***Week*** ***Month*** ***Year***
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***, these fields are unavailable for entry. If the course is ***External,*** enter details of the school in the **School Code** or **School** field. If you have set up a school code for the school, select the code from the list of options. When you move out of the field, the system completes the **School** name and makes the field unavailable for entry. If the school doesn't have a code, leave **School Code** blank, and enter the school name in **School.**

(FRA) France

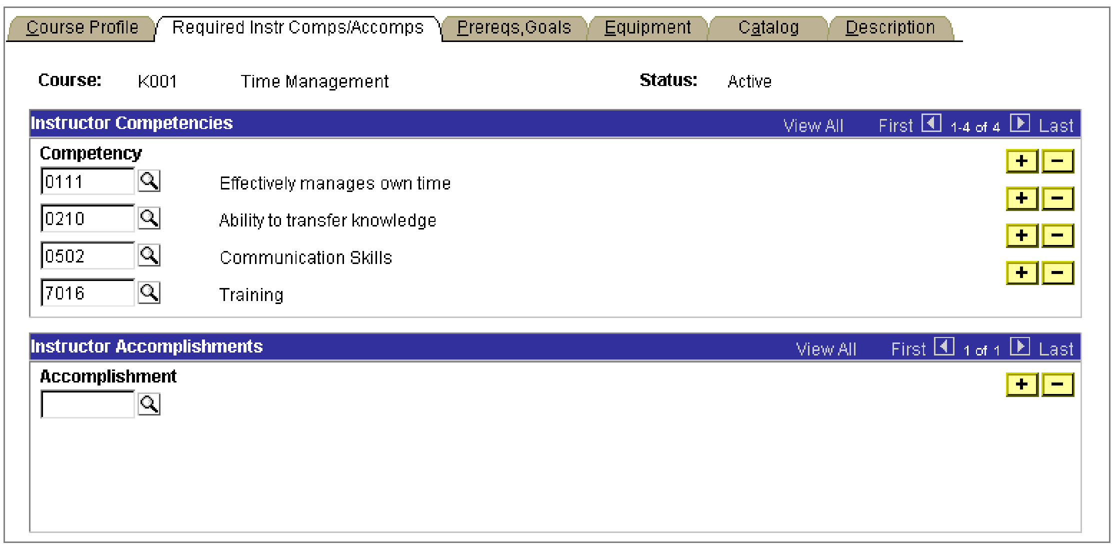
Chargeable — Select to make the training course a chargeable item. When this check box is selected, all expenses that are entered against this expense type are chargeable. This is used to meet the French legal reporting requirements.

See Also

"(FRA) Producing the French Training Report 2483"

Defining Instructor Competencies and Accomplishments

Access the Course Table - Required Instr Comps/Accomps page.



Course Table - Required Instr Comps/Accomps page

Select the Instructor Comps/Accomps Req check box on the Course Profile page to make the fields on this page available for entry.

Instructor Competencies

Competency — Select a competency to add to the instructor requirements.

Instructor Accomplishments

Accomplishment — Select an accomplishment to add to the instructor requirements.

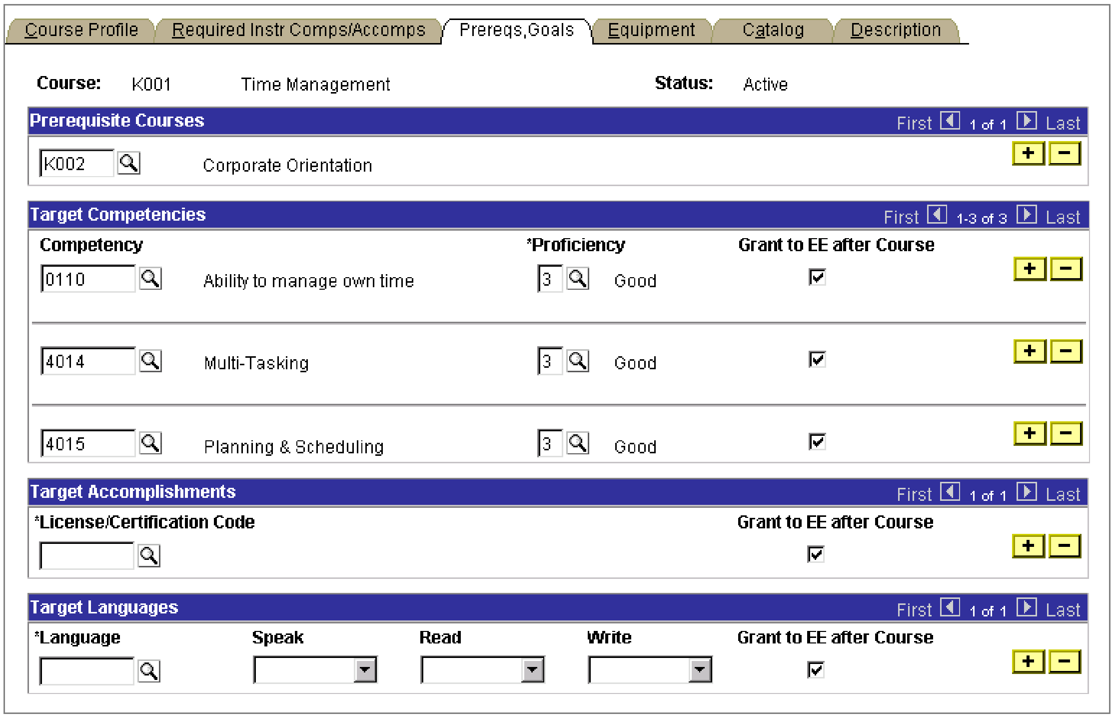
To add more competencies and accomplishments, insert additional rows.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments," Understanding Accomplishments and Competencies.

Specifying Course Prerequisites

Access the Course Table - Prereqs, Goals page.



Course Table - Prereqs, Goals page

Prerequisite Courses

Before you can select courses as prerequisites for other courses, you have to create them using the Course Table. Enter the basic courses first and work your way up to the courses that require prerequisites.

Target Competencies

Competency Select a target competency from the list.

Proficiency Select the default proficiency level for a competency that the student receives upon completing the course. For example, a beginner's course competency might give a rating of ***Fair,*** while an advanced-level course competency could warrant a rating of ***Expert.*** Competencies that are automatically assigned to an employee's profile have the evaluation type ***Approved.***

If the **Grant to EE after Course** check box is selected, the system adds the competency to the employee's profile and sets the proficiency rating to the value in this field.

Grant to EE after Course (grant to employee after course)
Select to have the system update the employees' competency profiles when they complete the course.

Target Accomplishments

License/Certification Code
Select a code from the list if students are awarded a license/certification upon completion of the course.

Grant to EE after Course
Select to have the system update the employees' accomplishment profiles when they complete the course.

Target Languages

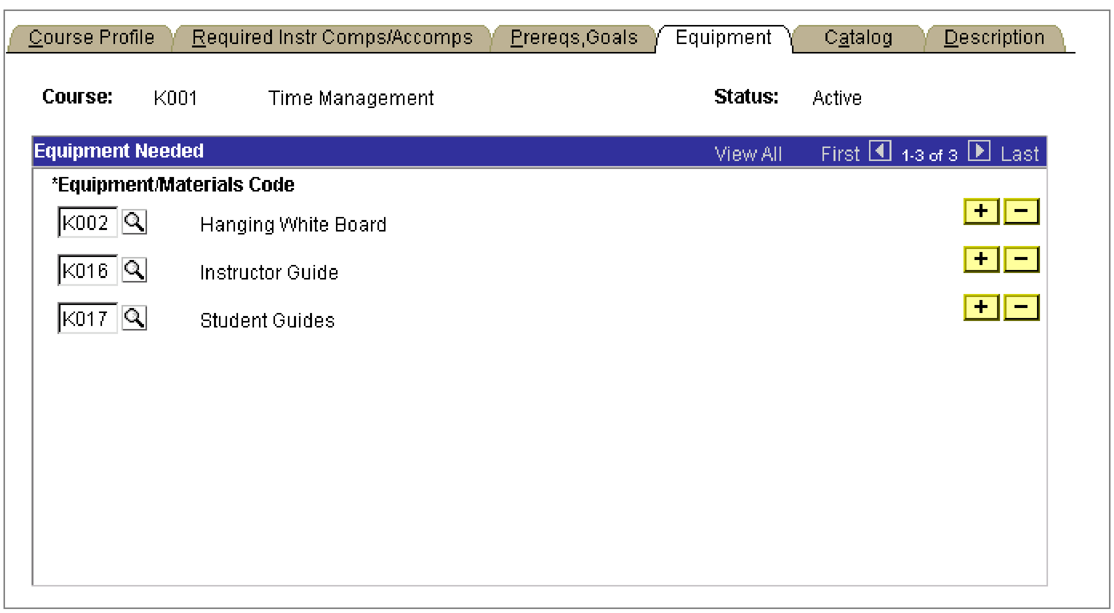
Language
Select a language from the list of values.

Speak, Read, Write
Select ***High, Moderate,*** or ***Low*** in each field to indicate the level of proficiency that you expect students to have achieved upon completion of the course.

Grant to EE after Course
Select to have the system update the employees' accomplishment profiles with the language and proficiency when they complete the course.

Defining Equipment and Materials

Access the Course Table - Equipment page.



Course Table - Equipment page

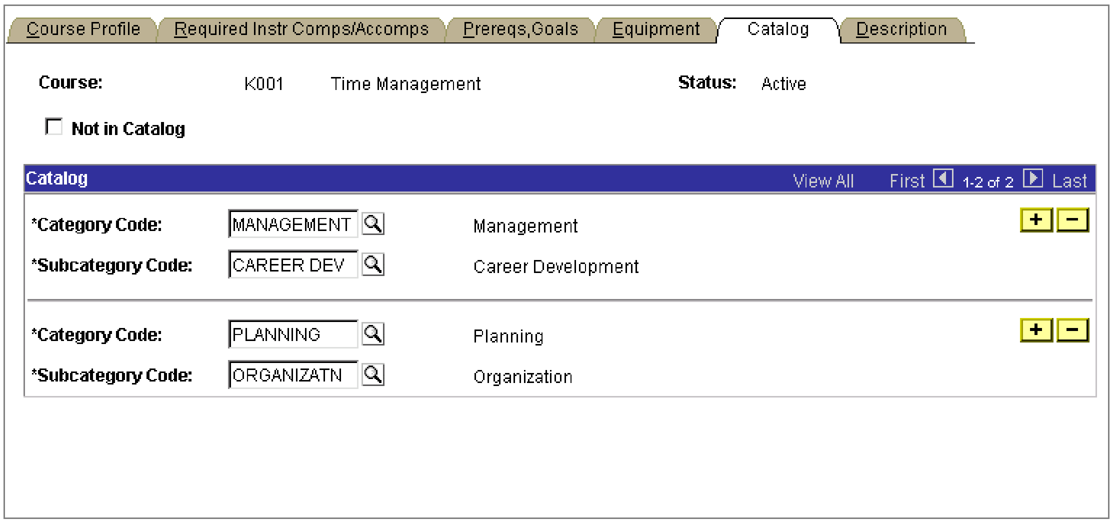
Equipment Needed

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

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

Specifying Course Classifications

Access the Course Table - Catalog page.



Course Table - Catalog page

Placing courses in a catalog is a way of organizing your training courses into a structure that helps you administer courses more efficiently, especially if your organization manages a large number of diverse courses.

Not in Catalog

Select if you don't want to include the course in your course catalog. If you select this check box, the **Category** and **Subcategory Code** fields are unavailable for entry.

Note. If you've already specified a category or subcategory for a course, and you select this 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

Categories define training subjects, and subcategories allow for a more specific definition of the subject matter.

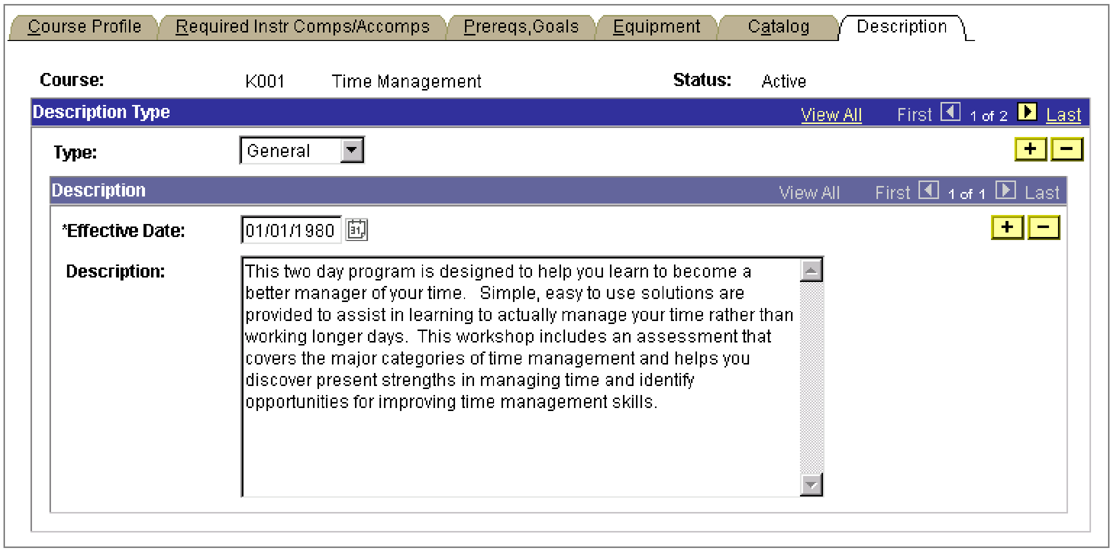
Category Code, Subcategory Code

To add a course to the catalog, select a category code and a subcategory code from the list of values.

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

Enter Additional Information About Course Content, Audience, or Agenda

Access the Course Table - Description page.



Course Table - Description page

Type

Select a description type for the type of information to add. Options are ***Agenda, Contents, Audience,*** and ***General.***

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

Note. The **Effective Date** on this page applies only to the **Description,** not to the entire course definition.

Setting Up Your Training Catalog and Training Programs

Using the pages in this section, you can:

- Examine and adjust your category/subcategory organizational structure.
- Create training programs by grouping courses into logical progression.
- Associate standard training programs with job codes in the Job Code Table.

This section describes how to:

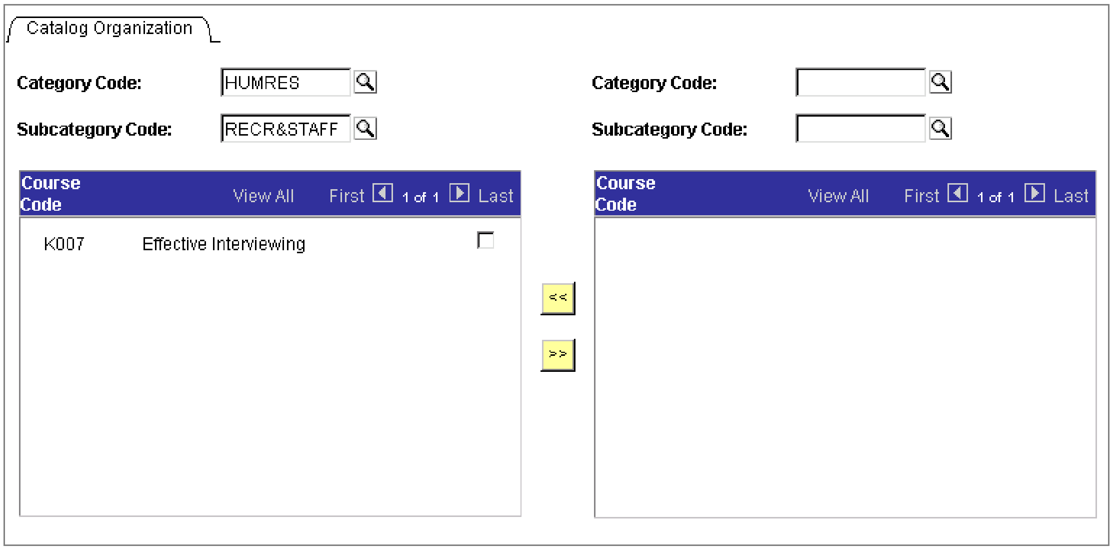
- View courses that are associated with selected categories and subcategories and reorganize your training catalog.
- Create a training program.
- Set up non-course training.

Pages Used to Set Up a Training Catalog and Training Program

Page Name	***Object Name***	***Navigation***	***Usage***
Catalog Organization	TRN_CATALOG_MOVE	Develop Workforce, Administer Training (GBL), Setup, Catalog Organization, Catalog Organization Develop Workforce, Budget Training (GBL), Setup, Catalog Organization, Catalog Organization	View courses that are associated with a selected category and subcategory. Reorganize your training catalog by moving courses between categories or subcategories.
Training Program Table	TRN_PROGRAM_TABLE	Develop Workforce, Administer Training (GBL), Setup, Training Program Table, Training Program Table Develop Workforce, Manage Competencies (GBL), Setup, Training Program Table, Training Program Table Develop Workforce, Plan Careers, Setup, Training Program Table, Training Program Table	Create a training program.

Viewing and Reorganizing Courses

Access the Catalog Organization page.

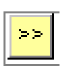
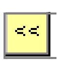


Catalog Organization page

Before using this page, set up your category and subcategory codes on the Page Used to Set Up Course Categories.

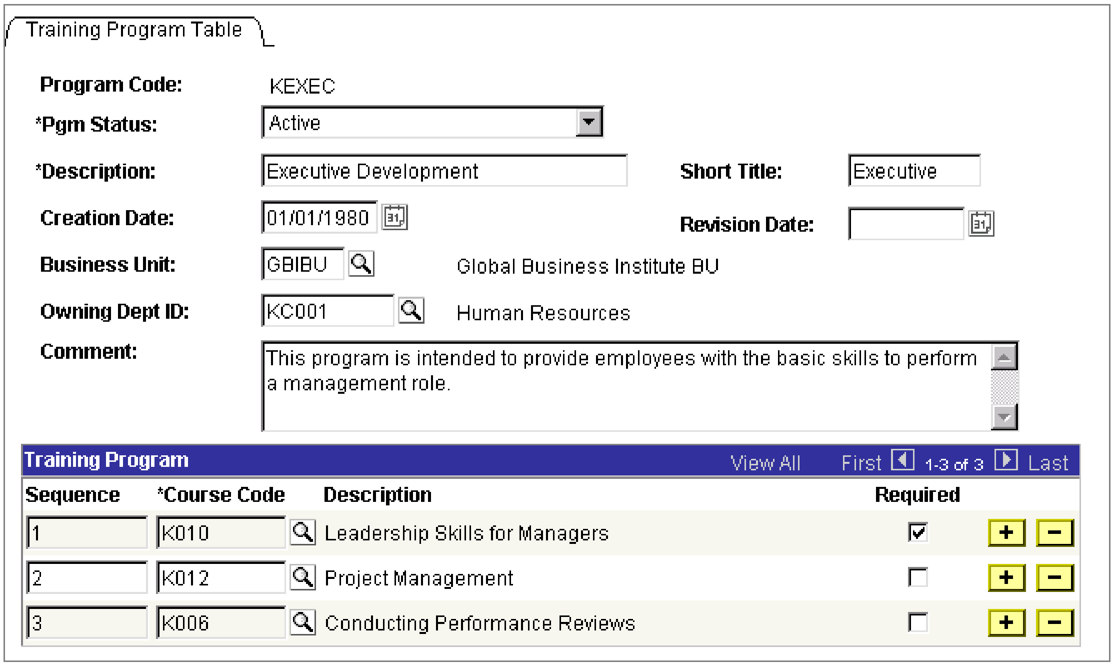
To view the courses in a selected subcategory, select the **Category Code** and **Subcategory Code** in the left or right column. When you move out of the **Subcategory Code** field, the system lists the courses in that subcategory. To move courses out of that subcategory, select the check box next to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

	Click to move selected courses from the category in the left column to the category in the right column.
	Click to move selected courses from the category in the right column to the category in the left column.

Creating a Training Program

Access the Training Program Table page.



Training Program Table page

Pgm Status (program status) — Select ***Active*** (the default), ***Inactive,*** or ***Proposed.***

Short Title — Enter an abbreviated description of the training program.

Creation Date — The default is the system date (usually today's date), which you can change.

Revision Date — If you update the program later, enter that date.

Business Unit — Select the business unit that you want to associate with this training program.

Owning Dept ID (owning department ID) — Based on the business unit that you selected, select the department that is responsible for maintaining the training program.

Training Program

Sequence — The system sorts courses by course code. If you want the codes that you select in the **Course Code** field to appear in a different order, enter sequence numbers in this field 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 the page again, the courses appear in the new order.

Course Code — Select a code for each course in the training program.

Required — Select if the course is mandatory.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Your HRMS System," Understanding PeopleSoft HRMS

(MEX) Understanding Mixed Committees for Employee Training

As a company operating in Mexico, you are required to create training and development plans for your employees. The plan consists of identifying courses and events that meet the training and development needs of the workforce.

Each course or event should have a detailed description of the objective and activities. Training can be internal or external. Depending on the type of training, there are specific legal forms to fill out.

The mixed committee for training and development must review and approve the training plan.

You can now store the details for your training and development plans on the Training Program Table page.

See Also

PeopleSoft Human Resources PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents," (MEX) Defining Mixed Committees

Setting Up Non-Course Training

Not all training involves taking a course or attending a class, so you may need to establish training IDs for the many other forms that training can take; for example, multimedia CD-ROM presentations, videos, or self-paced training guides.

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

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Using Competencies to Manage Training," Using Competencies to Manage Training

CHAPTER 4

Setting Up Training Costs

This chapter provides an overview of setting up training costs and tells you how to:

- Set up training cost currency.
- Set up training cost units.
- Set up default training costs.
- Set up student costs.
- Set up training budgets.

Understanding 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.

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

Common Elements Used in This Chapter

Cost Unit — Select the cost unit that is associated with the cost that you entered in the Per Unit Cost field.

Default Costs — Click this button to populate the cost fields with default costs that you have defined for the category or subcategory. When you click this button, the From which Category / Sub-Category page appears. (You can use default course costs from a category or a subcategory according to your catalog structure.)

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

	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 to the right of the code field.
Instructor ID	If the instructor is defined in the Instructor Table, select the instructor ID from the list of values. Otherwise leave this field blank and enter the instructor's name in the Name field.
Name	If the instructor isn't defined in the Instructor Table, enter the instructor's name in this field.
Room Code	Select a room for the courses from the list of rooms that are available at the selected facility. When you move out of this field, the room name appears. If you didn't select a training facility from the Training Facility Table, this field is unavailable for entry.

(FRA) France

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

Setting Up Training Costs and Budgets

To use the Budget Training business process in PeopleSoft, you need to set up your budgeting structure. Once you set up your basic costs, you can enter budgets for departments in your organization.

Following is an overview of the steps for setting 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 define the exchange rate to use.

2. Review cost units.

   Cost units are the units that are 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 kilometer. So, to enter a cost, enter the amount and then select a cost unit for that amount. PeopleSoft delivers a set of cost units in the Cost Unit Table. 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, record default costs such as vendor or facility costs, for each training element. You can set up default costs for your catalog and use them as defaults for the course costs.

4. Set up student costs.

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

5. Set up budget periods and departmental budgets.

See Also

Setting Up Default Training Costs

Setting Up Student Costs

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 the Budget Training business process.

This section describes how the system handles currency defaults and how to set up your currency and currency exchange rate.

Overview of Training Currencies

As you work in the Budget Training business process, the system displays up-to-date costs without running a 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 converts all amounts to a *single, base currency* and stores the 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 review cost information for an employee, a department, or the entire organization, the system converts the costs (in the training cost tables) to the display currency that is appropriate for the organizational level. Display currencies can be different from your training base currency.

Note. Departments can have display currencies that are different from the 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 that are associated with that business unit—for a budget period in the Budget Period Table (BUDGET_PERIOD_TBL).

To provide a consistent means of tracking and maintaining training costs, you 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 helps insulate your training process from external fluctuations in exchange rates and provide you with consistent cost information through your budget period.

Following is an overview of the steps for setting up training cost currency information:

1. Create a currency rate type for Budget Training.

   Add a new rate type for Budget Training from the General Options menu.

2. Set up a training currency exchange rate.

   Define the exchange rates that you want your Budget Training business process to track by selecting **Define Business Rules, Define General Options, Setup, Market Rate.**

3. Set up the base currency for Budget Training.

   Even if you have already defined a base currency for PeopleSoft HRMS in the Define General Options menu, before you can establish any training costs in the Training Administration business process, you must define a special training base currency.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Currencies"

Understanding Training Base Currency Defaults

When you're entering training costs on your Training Administration and Budget Training pages, you need to understand where the default currency code is coming from and how the system determines the currency defaults 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 following table 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 that is 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 that is defined in the Department Budget Table. Case 2: Base Currency that is defined in this business process' Base Currency Table.
No budget period or department; for example, Employee Training Cost.	Specific to nonbudgeted training.	Currency that is defined in the system Installation Table.

Performing Training Cost Currency Conversions

The following table explains the training cost currency defaults in the Budget Training and Administer Training business processes. The table also details how the system uses the budget period begin dates or effective dates to establish the exchange rate to use for converting 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 on 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 that 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.
Displayed costs (summary pages, budget plan)	The system converts costs from the base currency to the displayed currency. The date that the system uses for the conversion is the begin date of the budget period.

The date that the system uses to convert to the base currency and the date that the system uses to convert to the display currency are not the same, except for 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. If the length of time between the two dates is great enough to allow for changes in the currency conversion rate that your organization ordinarily uses, the displayed cost could be very different from the cost that you originally entered. To avoid this problem, you define a special exchange rate on the Exchange Rate Table for use by the Budget Training business process.

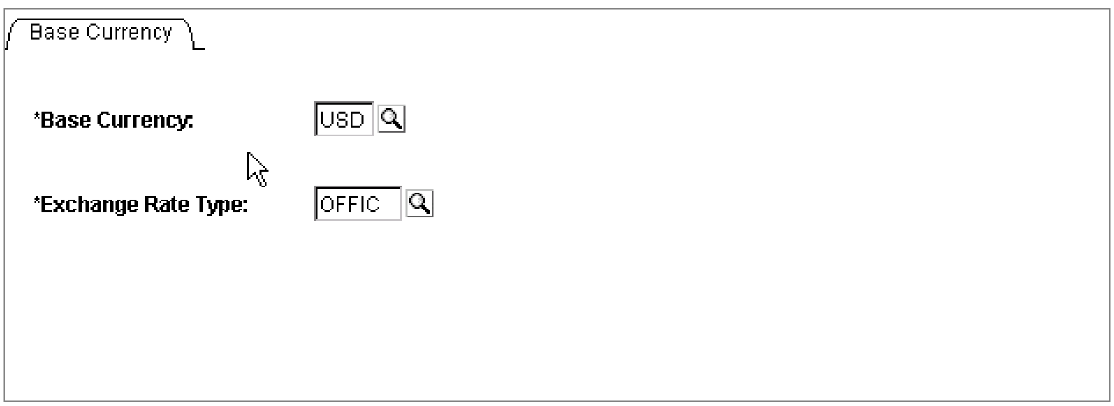
Because you are comparing your training budgets with training costs over a period of time (budget period), you set up a unique training currency exchange rate that enables you to track training costs consistently through your budgetary cycle. To do that, you set up an exchange rate type specifically for your training budget.

Page Used to Specify the Base Currency

Page Name	*Object Name*	*Navigation*	*Usage*
Base Currency	TRN_BASE_CURRENCY	Develop Workforce, Administer Training (GBL), Setup, Base Currency, Base Currency Develop Workforce, Budget Training (GBL), Setup, Base Currency, Base Currency	Specify the base currency to use to track all cost amounts.

Specifying the Base Currency for Tracking Cost Amounts

Access the Base Currency page.



Base Currency page

Base Currency Select a currency code from the list of values.

While you can enter training costs in multiple currencies, the system converts any training costs in your Administer Training business process to the base currency that you enter here.

Exchange Rate Type Select the currency for your Budget Training business process.

If you've defined an exchange rate type 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 business processes.

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

See Also

Setting Up Default Training Costs

PeopleSoft Application Fundamentals PeopleBook,” Working with Currencies”

Setting Up Training Cost Units

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

This section describes how to specify the relationship between the Cost Unit and Duration Label on the Cost Type Table.

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 processes. The system uses the cost unit type that is associated with a training component to determine the subset of cost units to display as you enter cost information.

Using Views to Select the Right Cost Unit

To ensure that the system displays the appropriate cost units when you enter different cost categories, the Cost Unit field prompts to a view that selects one or several cost units by specifying the cost unit type that is associated with the cost unit. For example, when you enter instructor costs, the cost unit prompts to the view TD_COST_UNIT_VW, which selects *Time* and *Training* cost units only.

For expenses, the system performs no special Cost Unit Type selection: 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 that is based entirely on the cost unit that you select as the per-unit cost to which the duration value is related. For example, when you enter a cost for instructors on the Course Session Cost Table, two instructors might teach the same course session. They might work together to teach the course session at the same time, or one might present one portion of the session, and the other might 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 selected as the per-unit cost amount for the instructor:

- If the instructor costs USD 200 per person, per day, the duration cost unit is in days.
- If the instructor cost is USD 200 per person, per year, the duration cost unit is in years.

See Also

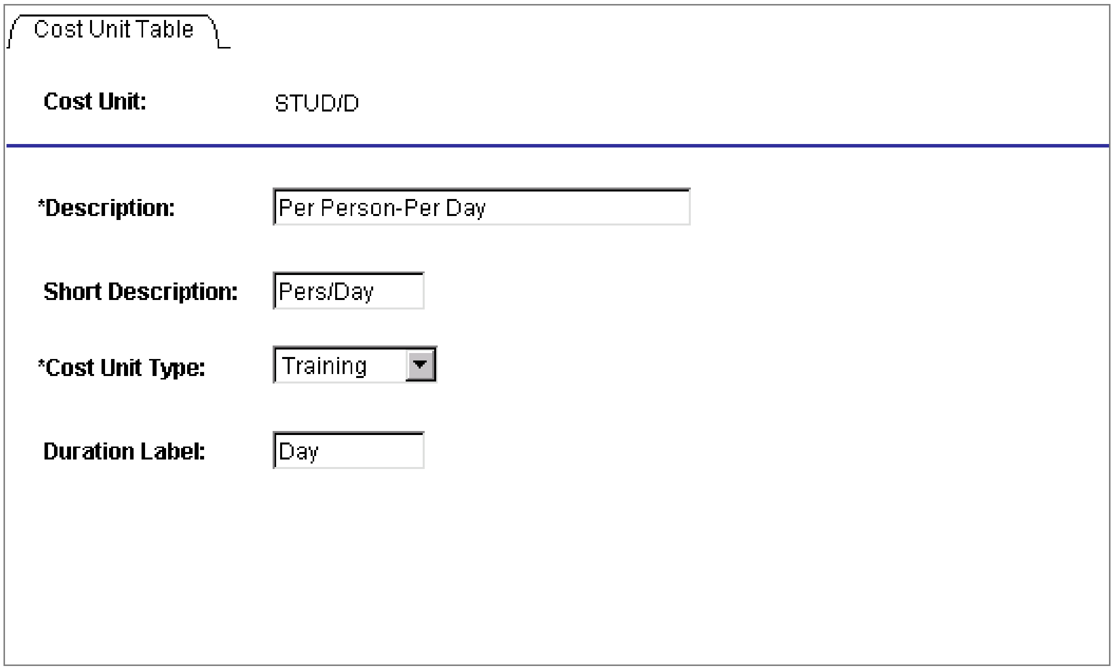
"Planning Training Budgets for Your Organization," Understanding How the System Calculates Training Element Costs

Page Used to Specify the Relationship Between Cost Unit and Duration Label

Page Name	*Object Name*	*Navigation*	*Usage*
Cost Unit Table	COST_UNIT_TABLE	Develop Workforce, Administer Training (GBL), Setup, Cost Unit Table, Cost Unit Table Develop Workforce, Budget Training (GBL), Setup, Cost Unit Table, Cost Unit Table	Specify the relationship between the Cost Unit and the Duration Label.

Specifying the Relationship Between the Cost Unit and Duration Label

Access the Cost Unit Table page.



Cost Unit Table page

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

Cost Unit Type

Enter a cost unit type to group similar cost units together.

As you identify various training costs in your business process, you enter units of cost (such as instructors) for each training component. Options are:

Metrics: For expensing traveled distances (for example, miles, kilometers).

Time: For time duration (for example, hour, day).

Training: For training cost types (for example, Flat Cost, Person/Day).

General: Use when you don't know the cost type.

Duration Label

Enter the duration label to use for 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 USD 200 per person, per day, the duration is expressed in days.

Convert to annuity factor

This factor determines by how many times the duration is multiplied to be equal to one year. This factor is useful to parameterize the number of working weeks in a year or the number of hours in a year.

Here is the factor provided by the system:

Year: cannot be modified by the user – factor = 1

Month: 12

Week: 12 = 4 = 48

Day: 12 * 20 = 240

Hour: 12 * 20 * 8 = 1920.

Note. Cost elements are updated on-line as soon as training elements cost are entered. If you change the annuity factor during a budget period, costs already computed are not impacted. The annuity factor should be set before entering any costs in the system.

Setting Up Default Training 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 that is associated with that amount. For example, if an instructor costs USD 100 per hour, the Per Unit Cost is *100* and the Cost Unit is *Hour.*

When you specify 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 for teaching different courses.
- Facility costs and vendor costs tend to remain constant for different courses.

Because these costs tend to remain the same across courses and sessions, the system stores the instructor cost on the Instructor Table (TRN_INSTRCT_TBL), the Training Facility Table (TRN_FACIL_TBL), and the Vendor Table (TRN_VENDOR_TBL). The system uses this cost as the default cost for instructors, vendors, and facilities whenever they are referenced in the Administer Training and Budget Training business processes.

Defining Catalog Costs

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

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. Then 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 assign a course only 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 they might not be necessary for your organization.

Defining Course Session Costs

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

See Also

"Administering Course Sessions"

Pages Used to Set Up Default Training Costs

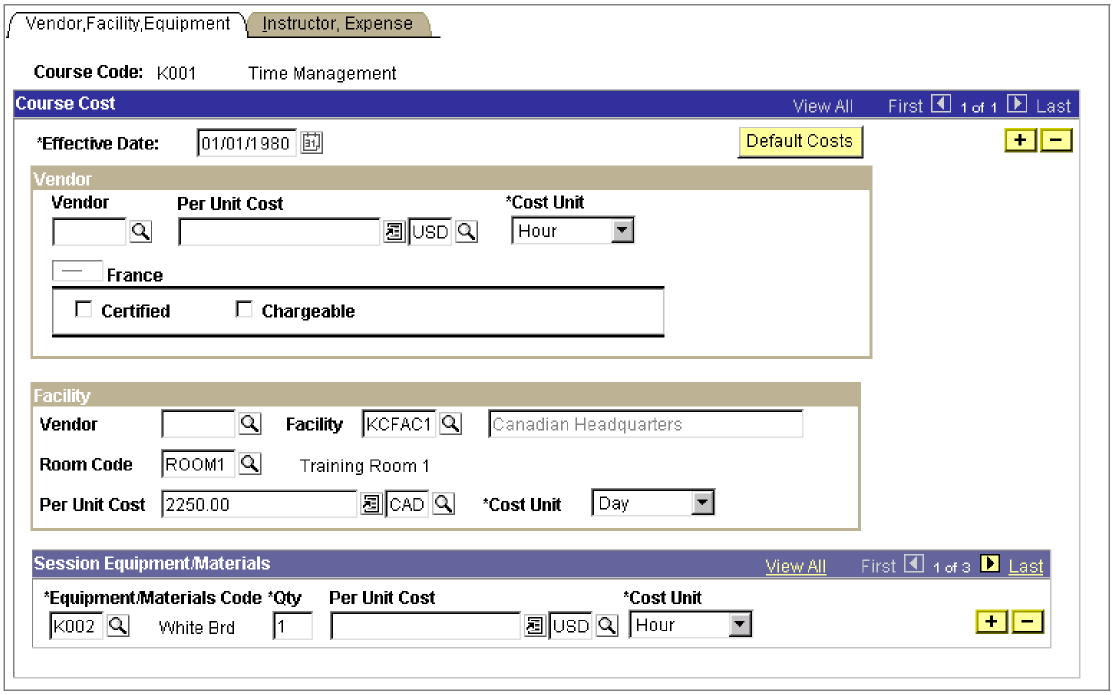
Page Name	***Object Name***	***Navigation***	***Usage***
Course Cost – Vendor, Facility, Equipment	TRN_COST_TBL1_GBL	Develop Workforce, Administer Training (GBL), Setup, Course Cost, Vendor, Facility, Equipment Develop Workforce, Budget Training (GBL), Setup, Course Cost, Vendor, Facility, Equipment	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 defines its course costs.
Course Cost – Vendor, Facility, Equipment – From which Category / Sub-Category	TRN_CATLG_CRSE_SEC	Click the Default Costs button on the **Course Cost – Vendor, Facility, Equipment page**.	Select the source of the default costs.
Catalog Cost – Instructor, Expense	TRN_COST_TBL2_GBL	Develop Workforce, Administer Training (GBL), Setup, Course Cost, Instructor, Expense Develop Workforce, Budget Training (GBL), Setup, Course Cost, Instructor, Expense	Define default instructor costs, such as meals, parking fees, and other expenses, for a course.

Page Name	***Object Name***	***Navigation***	***Usage***
Catalog Cost – Vendor, Facility, Equipment	TRN_COSTC_TBL1_GBL	Develop Workforce, Administer Training (GBL), Setup, Catalog Cost, Vendor, Facility, Equipment Develop Workforce, Budget Training (GBL), Setup, Catalog Cost, Vendor, Facility, Equipment	Enter the default vendor, facility, and equipment costs for a category or subcategory that is defined on the **Category/Subcategory Table page**.
Catalog Cost – Instructor, Expense	TRN_COSTC_TBL2_GBL	Develop Workforce, Administer Training (GBL), Setup, Catalog Cost, Instructor, Expense Develop Workforce, Budget Training (GBL), Setup, Catalog Cost, Instructor, Expense	Enter default instructor costs and other expenses that are associated with courses in a selected category or subcategory.

Note. The Catalog Cost and Course Cost components are nearly identical and share the same fields.

Entering Vendor, Facility, and Equipment Costs

Access the Course Cost - Vendor, Facility, Equipment page.



Course Cost - Vendor, Facility, Equipment page

To use the course costs from the category or subcategory as the default costs, set them up using the Catalog Cost component.

Vendor

If an external vendor runs the course, define the default vendor costs in this group box.

Vendor	Select the default vendor for the category or subcategory from the list.
Per Unit Cost	The default is the vendor cost from the Vendor table, if you have set up vendor costs. You can override the default.

Facility

Vendor	If you use a vendor's facility for the course, select the vendor from the list. Otherwise leave this field blank.
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.

Session Equipment/Materials

Equipment/Materials Code Select the equipment code from the list of valid values. Insert a row for each equipment/material code required for the course.

Per Unit Cost Enter a per-unit cost for each item. “

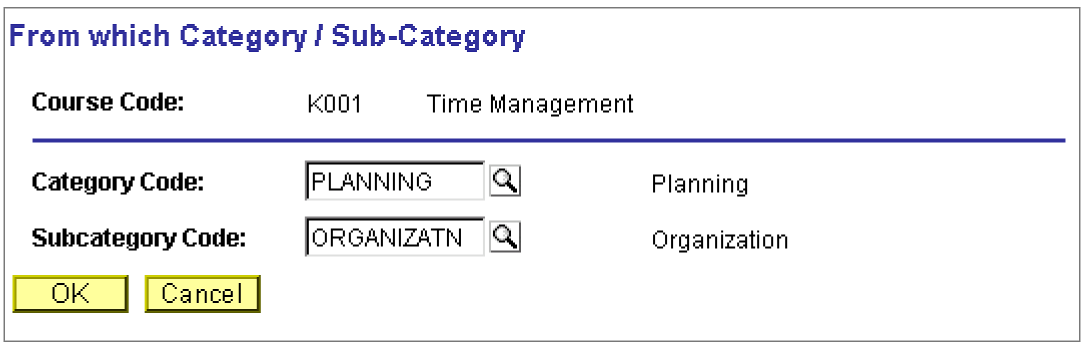
See Also

Setting Up Training Cost Units

“Producing the French Training Report 2483“

Defining the Source of Default Costs

Access the From which Category/Sub-Category page.



From which Category/Sub-Category page

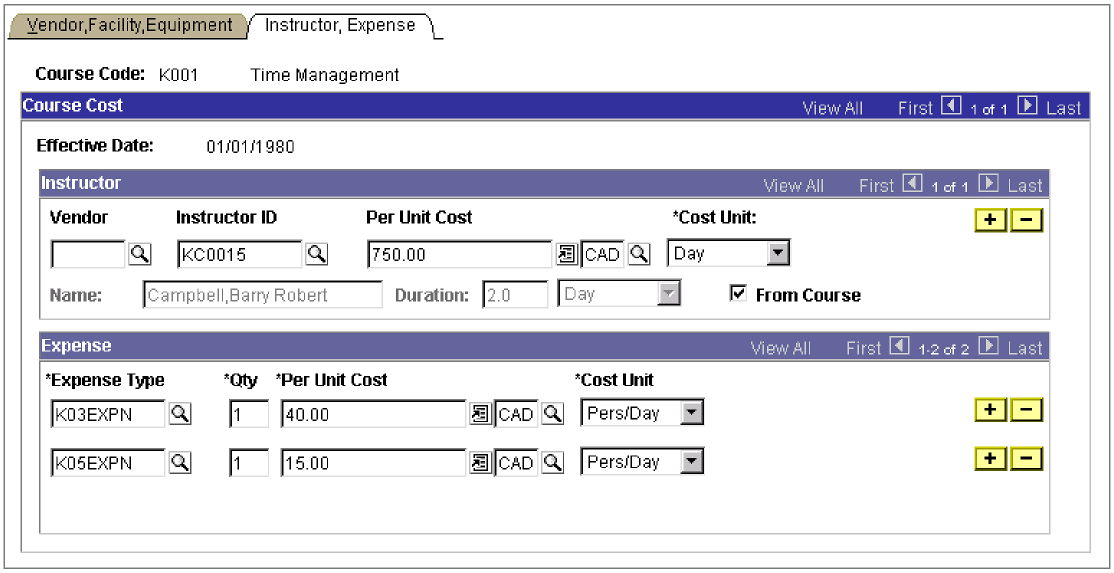
Category Code Select the category code from the list of categories to which the course belongs.

Subcategory Code Select the subcategory code from the list of subcategories.

To use costs from the category level as the default costs, select the category code and enter ***UNKNOWN*** in the **Subcategory Code** field.

Entering Instructor Costs and Other Expenses

Access the Course Cost - Instructor, Expense page.



Course Cost - Instructor, Expense page

Instructor

Vendor — If an external vendor runs the course, select the vendor ID from the list of vendors. If you're using an internal instructor, leave this field blank.

Per Unit Cost — The system populates the **Per Unit Cost** from the Instructor Table. You can override the default cos.

Duration — The default is the Duration value that you set up on the Course Table - Course Profile page.

To override the default, clear the **From Course** check box and enter the new value.

From Course — This check box is selected by default to show that the **Duration** field was populated from the Course Table. To override the default duration, clear this check box.

Expense

Expense Type — Select the expense type from the list.

Qty — Enter the quantity of the item that is specified in the **Expense Type** field.

Per Unit Cost — Enter the per-unit cost for the expense.

Setting Up Student Costs

To track the total cost of an employee who is taking a training course, you need to record:

- The costs that are associated with the course, such as the price of materials and instructors.

- The cost to your organization of the employee's lost work time.

  For example, if employees typically bill 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 that are associated with training, you can specify compensation costs at the Job Code level and at the individual employee level. To associate payroll costs with a group of similar Job Codes or a group of employees, use the Populate EE Training Costs (populate employee training costs) process to perform a mass update of your system.

Note. When the system processes training costs for an employee, and no employee training cost is specified on the Employee Training Cost Table, the system uses the Job Code Training Cost. If you've specified training costs at both levels, the employee-level cost takes priority.

Overview of Student Training Cost Defaults

Before you begin entering costs that are associated with job codes and employees in your organization, it's important to understand how the system determines the default training cost values that it displays on the system pages where you track training costs. The following chart explains the training cost defaults in the Budget Training business process:

Page Name	***Default Comes From***
Job Code Training Cost	No default.
Employee Training Cost	Job Code Training Cost.
Employee Demand	1. Employee Training Cost, when defined. 2. Otherwise Job Code Training Cost (with employee's job code). 3. 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 the employees/job codes that are included in the profile. Use the Compute button is to compute the training cost with the job codes that are listed on the page.
Department Demand	No default.
Employee Demand by Course	Same as Employee Demand.

See Also

"Defining Training Requirements," Determining Training Demands for Your Organization

Pages Used to Set Up Student Costs

Page Name	***Object Name***	***Navigation***	***Usage***
Job Code Training Cost	TRN_JOB_SLR_COST	Develop Workforce, Administer Training (GBL), Setup, Job Code Training Cost, Job Code Training Cost Develop Workforce, Budget Training (GBL), Setup, Job Code Training Cost, Job Code Training Cost	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 employees in this job code normally bill their time, this is the cost of the lost billing time while the employee is in training.
Employee Training Cost	TRN_EE_SALARY_COST	Develop Workforce, Administer Training (GBL), Setup, Employee Training Cost Develop Workforce, Budget Training (GBL), Setup, Employee Training Cost	Identify the cost of having an employee in training. For example, if you have employees who normally bill their time to a customer, enter the cost of the lost billing time while they are in training.
Populate EE Training Cost (populate employee training cost)	RUNCTL_TRN006	Develop Workforce, Budget Training (GBL), Process, Populate EE Training Cost	Process training costs for a group of job codes or employees.

(FRA) Note. An 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 specified group ID.

Identifying the Compensation Cost for Training an Employee

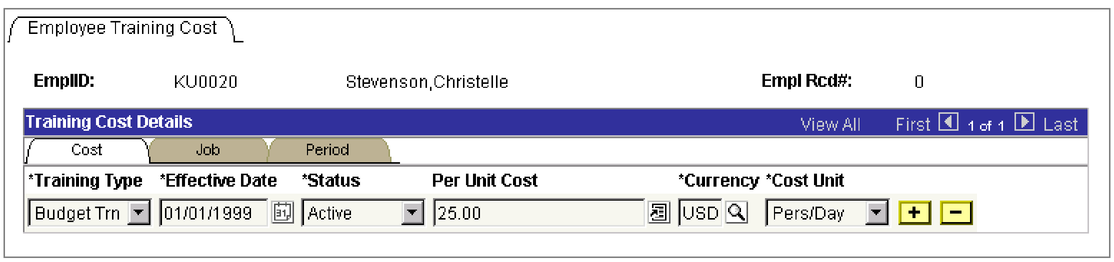
Access the Job Code Training Cost page.

Job Code Training Cost page

Per Unit Cost Enter the per-unit cost for the job code. Because the **Per Unit Cost** and **Cost Unit** fields are effective-dated, you can enter standard training costs for job codes, which can change over time.

Identifying the Cost for Training an Employee

Access the Employee Training Cost page.



Employee Training Cost: Cost page

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

Common Page Information

Training Type If you store separate training costs for Administer Training and Budget Training, select one of these options:

Admin. Trg (administer training).

Budget Trg (budget training).

(FRA) Note. French organizations store costs separately for Administer Training and Budget Training. If you aren't a French customer or you don't want to track separate costs for Administer Training and Budget Training, accept the ***Budget Trg*** default.

Job Tab

Job Code — Displays the default (the employee's job code from the Job Data Table) and makes this field unavailable for entry.

Period Tab

Period Begin Date — Enter the date on which the cost that you specified becomes effective.

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.

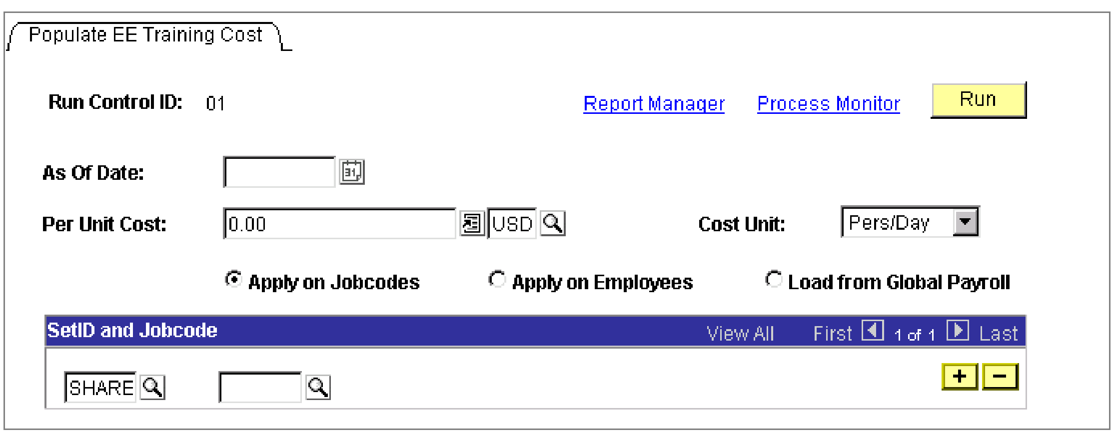
Calc. Flag (calculate flag) — The system sets this field to ***Manually,*** to indicate that the cost was entered manually, and makes this field unavailable for entry.

See Also

"Producing the French Training Report 2483"

Processing Training Costs for a Group

Access the Populate EE Training Cost page.



Populate EE Training Cost page

Note. 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. Use the Populate EE Training Cost process to specify a per-unit cost figure and a cost-unit metric to apply on the specified effective date to a group of job codes or employees.

As Of Date	Enter the effective date for this process.
Per Unit Cost	Enter the cost to use for processing the cost per job or cost per employee. **(FRA) Note.** 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	**(FRA) Note**. This field is unavailable for entry if you select **Load from Global Payroll** because costs are not entered manually but are calculated by the payroll runs.
Apply on Jobcodes	Select to apply the cost to employees with a specified job code. The system displays the SetID and Jobcode group box.
Apply on Employees	Select to apply the cost to given employees. The system displays the EmplID (employee ID) group box.
(FRA) Load from Global Payroll	This option is available to French customers only. Select to apply costs from your PeopleSoft Global Payroll for France system to a group of employees. The system displays the France group box.

SetID and Jobcode Group Box

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

EmplID Group Box

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

(FRA) France

From a regulatory perspective, individual hourly training rates must be provided for Administer Training 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.

Group ID	Select the group from the list of 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.
Administer Training	Select to load the Administer Training cost from your payroll system.

Budget Training — Select to load the Budget Training cost from your payroll system.

Element Name — Select the payroll element that stores the training cost to apply to the specified group.

Pay Periods

Period ID — Select the pay period from the list. For each period that is selected, the system loads costs into the Employee Training Cost Table.

Description, Begin Date, and **End Date** — The system displays the description and dates of the budget period and makes these fields unavailable for entry.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Groups"

PeopleSoft Global Payroll PeopleBook

PeopleSoft Global Payroll for France PeopleBook

PeopleTools PeopleBook: Process Scheduler

Setting Up Training Budgets

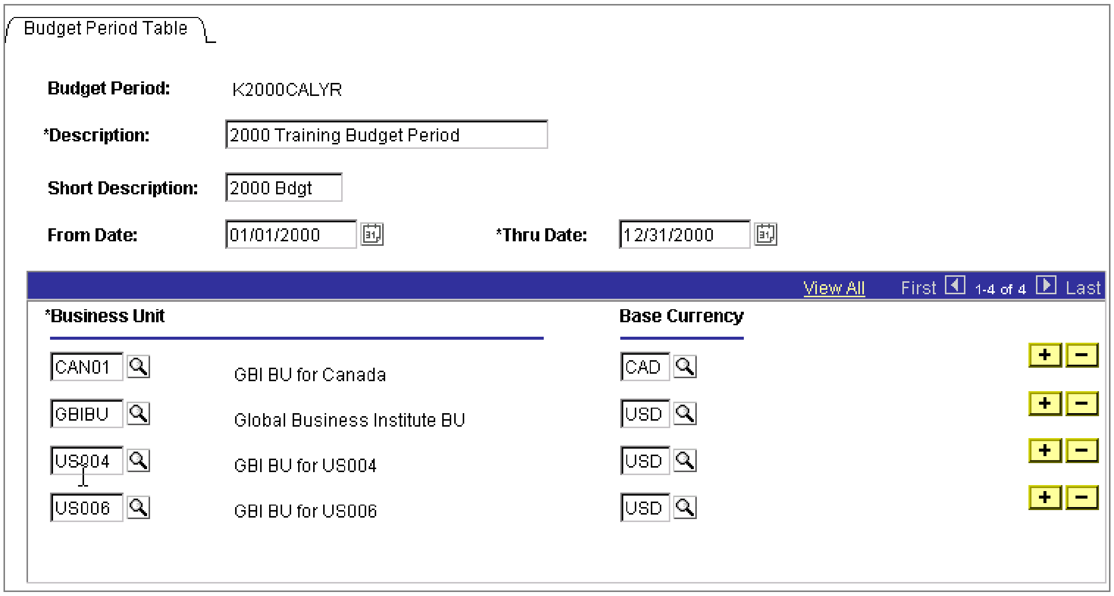
With your currency conversion, base currency and cost units defined, you're ready to set up training budgets for departments in your organization.

Pages Used to Set Up Training Budgets

Page Name	*Object Name*	*Navigation*	*Usage*
Budget Period Table	BUDGET_PERIOD_TBL	Develop Workforce, Budget Training (GBL), Setup, Budget Period Table, Budget Period Table	Define your budget periods.
Department Budget Table	TRN_BUDGET_TBL	Develop Workforce, Budget Training (GBL), Setup, Department Budget Table, Department Budget	Define the amount that is allocated to departments in your organization for training in a specified budget period.

Defining Budget Periods

Access the Budget Period Table page.



Budget Period Table page

You can also specify the base currency for department budgets and training costs. This ensures that you always compare budgets and costs in the same currency.

Use this budget to see how the estimated training costs that are based on your department training demand compare to a department's allocated training budget.

A *budget period* is a period of time for which a training budget is established. Your company's business needs determine the length of the budget period. Typically a budget period covers a one-year period. However, the length of the budget period depends on your business requirements and process cycles; the period could be a quarter, a month, or any other duration.

When you define a budget period, you associate it with one or more business units in your organization.

Important! When you establish a budget period, remember that course sessions must fall within the budget period that is to be included in the budget and its tracking. Be sure that a course session does not span two budget periods.

From Date and **Thru Date** (through date)	Enter the from (begin) and through (end) dates for the budget period.
Business Unit	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. This enables you to create training budgets for the employees in those business units. You can use only 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.

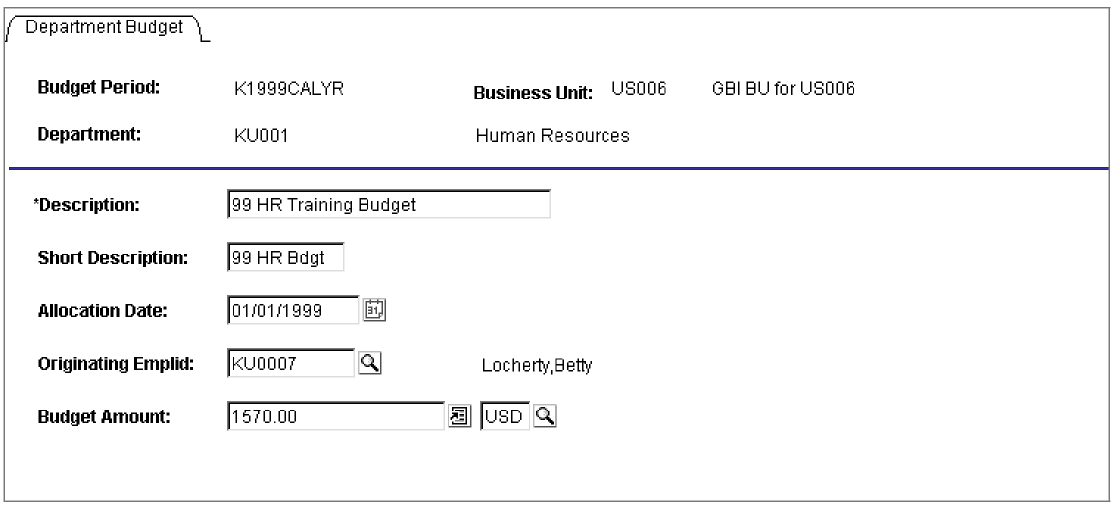
See Also

Setting Up the Training Cost Currency

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Your HRMS System," Setting Up Business Unit and SetID Functionality

Defining Amounts Allocated to Departments

Access the Department Budget Table page.



Department Budget page

Allocation Date — Enter the date that you allocate the budget to the department.

Originating Emplid (originating employee ID) — Select the ID of the person who allocated the budget.

Budget Amount — The currency that you enter is 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.

See Also

Setting Up the Training Cost Currency

CHAPTER 5

Defining Training Requirements

This chapter provides an overview of defining training demands (requirements) and tells you how to:

- Create a demand profile.
- Define profiles by criteria.
- Define general, department, and employee training demands.

Understanding Training Demands

To create a training budget, use the Budget Training business process, to determine how much training to provide for your employees.

In Budget Training, you identify your training demands on three levels: general, departmental, and employee. Then you can establish training demand at whatever level works best for your organization:

- If you work in a decentralized way, departmental- or employee-level forecasting works best.
- If you work in a centralized way, global-level forecasting works best.

Common Elements Used in This Chapter

Creation Date	If you're creating a new department demand, enter the creation date. The default is the system date, which you can change.
Demand ID	The system displays the demand ID that you selected. The system displays the default value, *NEW,* when you create a demand for the first time. You can accept the system-generated ID or enter a new ID. The system generates a sequence number based on the last demand ID that was stored in the Installation Table.

Demand Priority	Specify a priority for the demand. 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.
Expiration Date	Enter the last possible date for meeting the training demand. This field is for information only, but it can be useful if you decide to mark a demand as obsolete after a specific time.
From Date and Thru Date	The beginning (from) and ending (thru) dates of the budget period, which you entered when you opened the page.
Frozen	This check box is selected by the system if the budget period is frozen. If you try to modify this field, you get a warning message.
OrigEmplID (originating employee ID)	Select the employee ID of the person who created the demand.
Originator	Select the position of the demand's originator. Values are *Employee* and *Supervisor.*
Revision Date	Enter a revision date when you make changes to an original demand profile.

Training Demand Planning

To determine your organization's training demand, you build profiles of employees with similar qualities who need to take the same training courses. A profile is a template that you create to determine how many employees need to be trained in a certain area, based on the criteria that you specify.

You define profiles only once and use them 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.

See Also

Setting Up Demand Profiles

Determining Training Demands for Your Organization

The Budget Training business process offers four ways to establish training demand (the number of employees who are to be trained):

Demand Method	***Purpose***
General Demand	Define the number of employees to be trained in certain departments and for certain job codes.
Departmental Demand	Define the number of employees to be trained in a specific course for a particular department.
Employee Demand	Define the training requirements for individual employees.
Employee Demand by Course	Define the number of employees to be trained in a particular course.

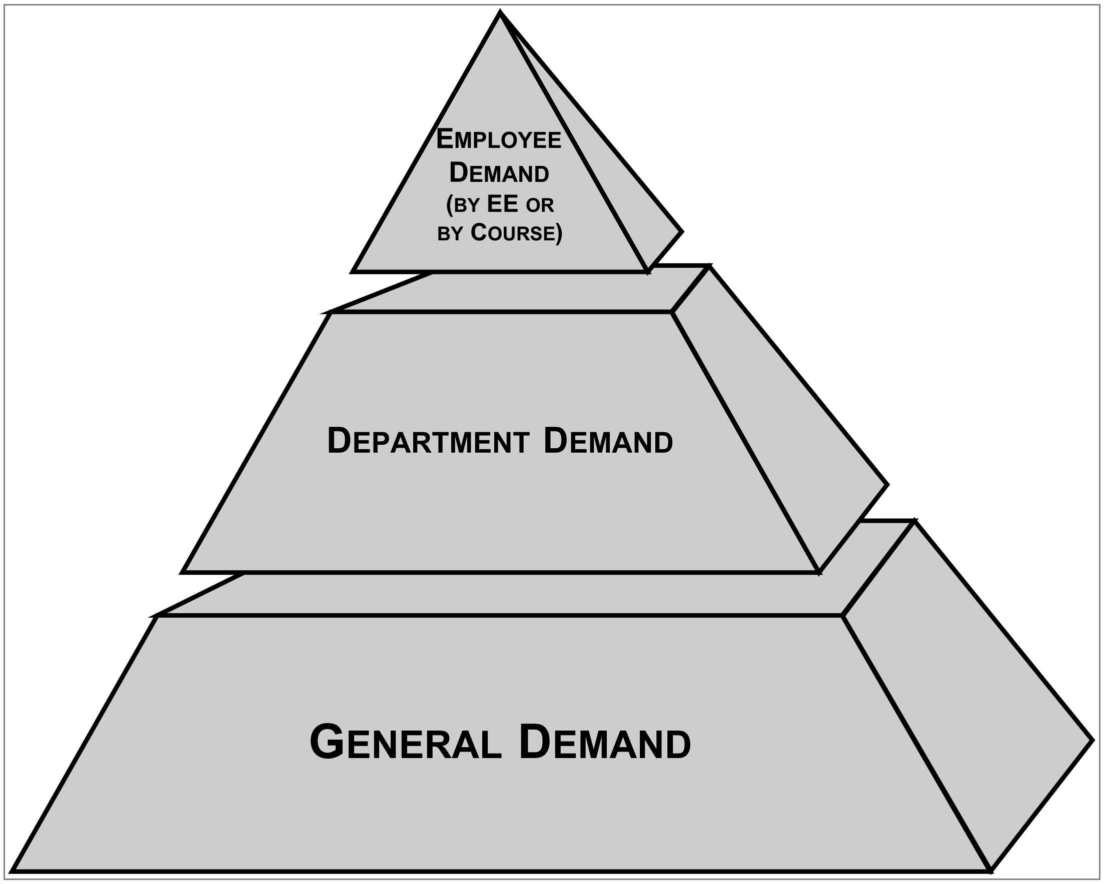
Note. All demands are established for a particular budget period.

Using these methods, you can:

- Get complete training information, from the training needs of your entire organization to those of the individual employee.
- Establish only one type of demand or one of each type.

For example, you can define general demands only and not work with departmental or employee demands at all. You can set up training budget scenarios and develop a training plan using just one method or all four methods.

- Determine the costs that are 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.



Understanding the layers of your organization's training needs

For each demand component, you define:

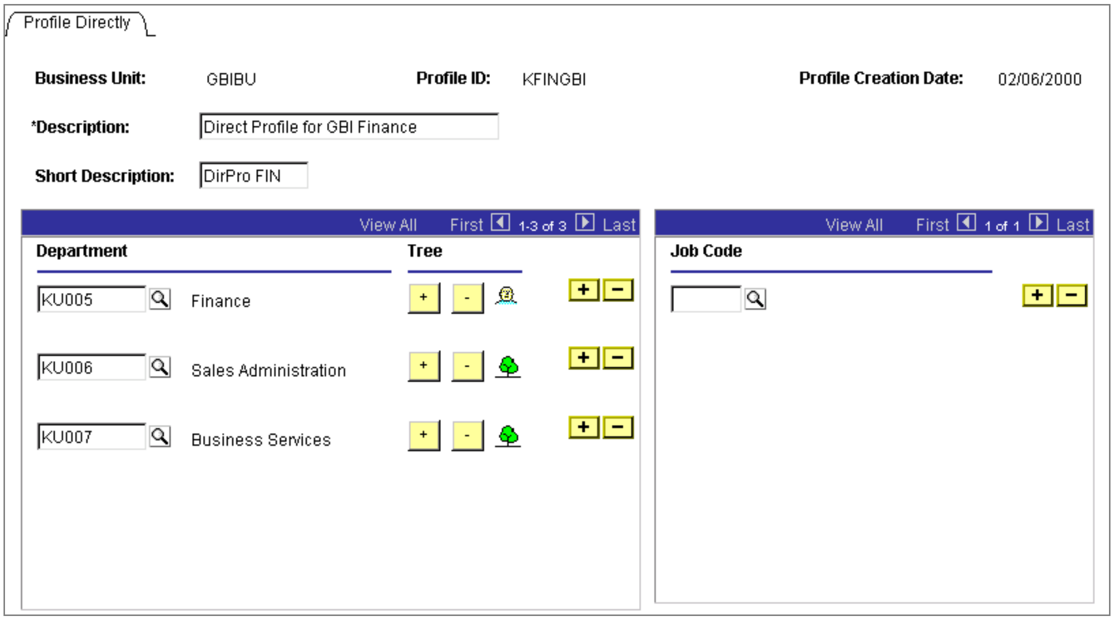
- Who in your organization is to be included when the system calculates the training demand for a course.

- The cost of training the employees for a demand.

  This cost is 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 in the Employee Demand or Employee Demand by Course components.

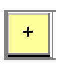
Using the Department Tree to Populate Departments

In the Budget Training business process, when you set up components of your organization's training budget process that reference department information, you can use your department security tree. Here is an example page:



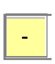
Example page using department tree to populate department

You can enter a parent department on the **Tree** and *automatically* include any child departments in departmental views, profile templates, and training demand definitions, using two **Tree** buttons.



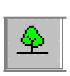
Click the **Expand** button to add related departments that are specified in the department tree to the list on the page. Then you can add several departments to the list in one step.

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

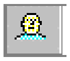


Click the **Collapse** button to delete related departments from the list. The system deletes only the departments that you added by using the **Expand** button. Departments that you added manually remain on the list, even if they are related departments.

Instead of using the **Expand** and **Collapse** buttons, you can enter departments manually by inserting a department row. The system displays two symbols to indicate whether you entered a department row by using the **Expand** and **Collapse** buttons or manually:



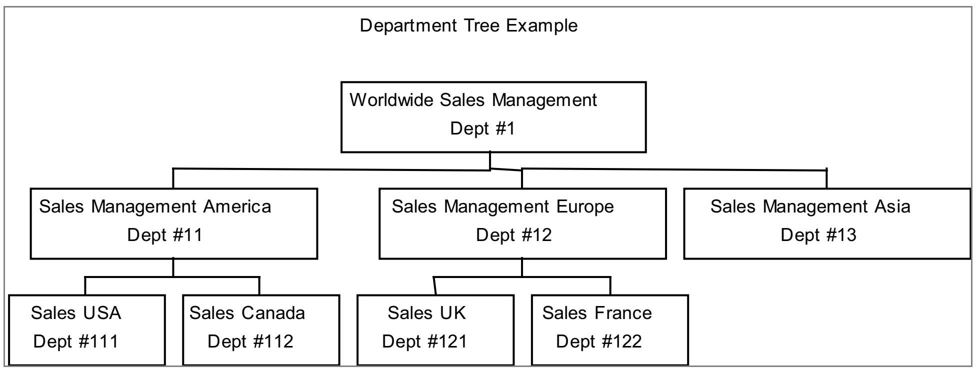
The **Tree** symbol indicates that you added the department by using the **Expand** button.



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

For example, when you establish the number of employees in your organization that need training for a course, and you want to specify a demand for your own department only, enter only your department number and the number of people who are to be trained. To train people in every department for which you are responsible, enter the department ID for the parent department and click the **Expand** button. The system creates a new data row for each department that is below the parent department, according to the department security tree.

For example, in the department tree shown below, the Expand process includes every level 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. 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.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security"

Setting Up Demand Profiles

You can build profiles using one of two methods—dynamic or static:

- Dynamic

  If every employee in a particular department with a 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.

- Static

If some employees in don't fit the department/job code criteria, then use the Profile by Criteria page. For example, to search for employees in a particular department and job code with certain competencies, use the Profile by Criteria page to create a static profile template.

This section describes how to:

- Create a dynamic profile.
- Create a static profile.
- View the number of employees selected by department and job code.
- Run the process that creates the demand profile.

Defining Demand Profiles by Criteria

Identifying workers who need training by using competencies is useful because you can include workers with certain competencies and proficiency levels for training in courses that can improve their competency levels. Or you can exclude employees who already possess a competency from the employees who should take a training course to improve that competency. On the Profiles by Criteria page, you can define your criteria by inclusion or exclusion or a combination of both. You can also define multiple criteria statements that the system processes in sequence, to further refine your profile.

By pooling training demand information from the department, job code, and competency areas, you can define the training needs for this employee group profile in your organization. The profile that you create becomes a template that you can reuse as you reassess training demands.

Note. You use the profile templates that you define here to create general demands for your organization, so set up those templates before working with the demand pages.

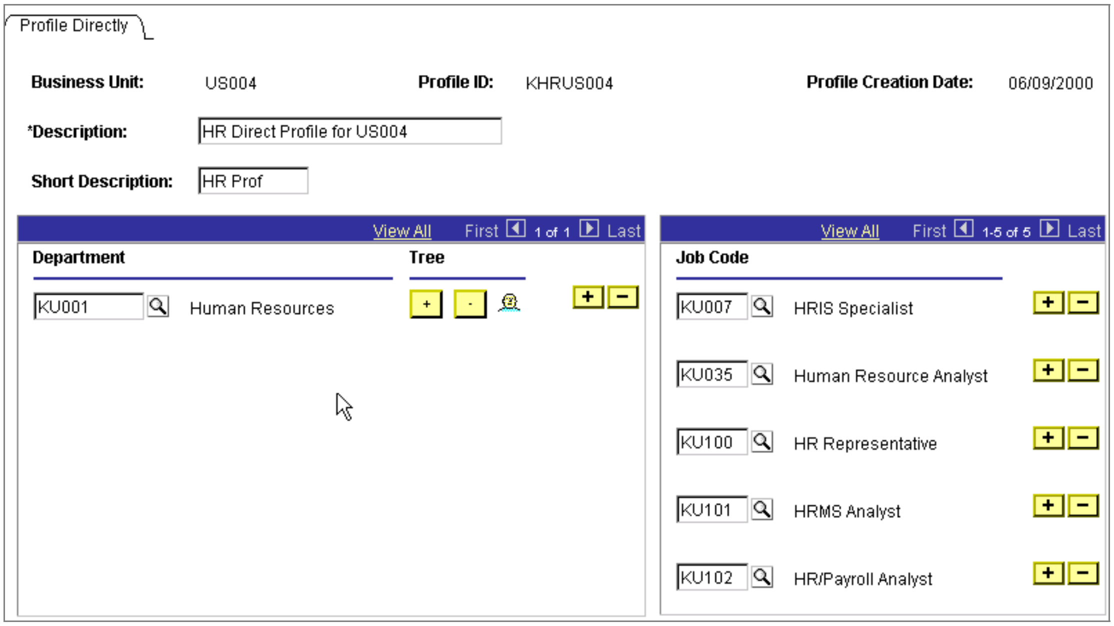
Pages Used to Create Profiles

Page Name	*Object Name*	*Navigation*	*Usage*
Profile Directly	TRN_PROFILE_CREATE	Develop Workforce, Budget Training (GBL), Use, Profile Directly, Profile Directly	Create a dynamic profile based on a list of department and job codes.

Page Name	***Object Name***	***Navigation***	***Usage***
Profile by Criteria - Profile Criteria	TRN_PROFILE_TABLE	Develop Workforce, Budget Training (GBL), Use, Profile by Criteria, Profile Criteria	Create a static profile by defining criteria that includes or excludes employees in your training plans. To include competencies in your selection criteria, set up competency codes on the Competency Table Setup page.
Profile by Criteria - Profile Selection	TRN_PROFILE_VIEW	Develop Workforce, Budget Training (GBL), Use, Profile by Criteria, Profile Selection	View the number of employees selected by department and job codes according to the criteria on the Profile by Criteria - Profile Criteria page.
Create Delayed Profile	RUNCTL_TRN009	Develop Workforce, Budget Training (GBL), Process, Create Delayed Profile, Create Delayed Profile	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. Run this process only if you selected the Delayed check box on the Profile Criteria page. Set up the demand profile before running the selection criteria on the Profile Criteria page.

Creating a Dynamic Profile

Access the Profile Directly page.



Profile Directly page

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

Note. While the profile always gathers the employees in these departments and jobs, remember that the number of employees changes over time as the department headcount changes and as employees change job codes.

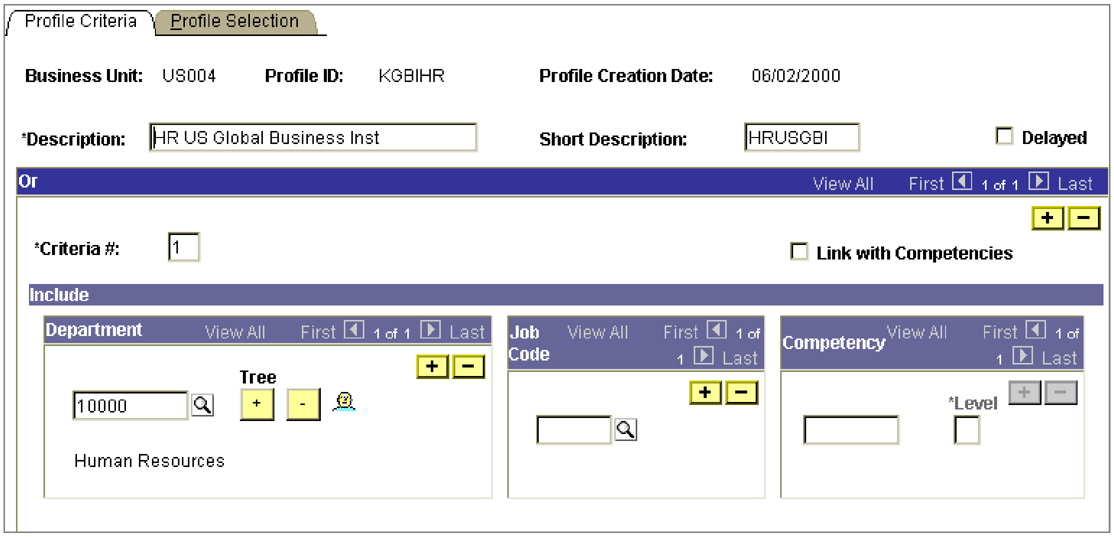
Department	Select the department to include in your training profile template. To include the department that you specify and all of its child departments shown in the **Tree,** use the **Expand** or **Collapse** button.
Job Code	Select the job codes for the departments that you specified that have training requirements.

See Also

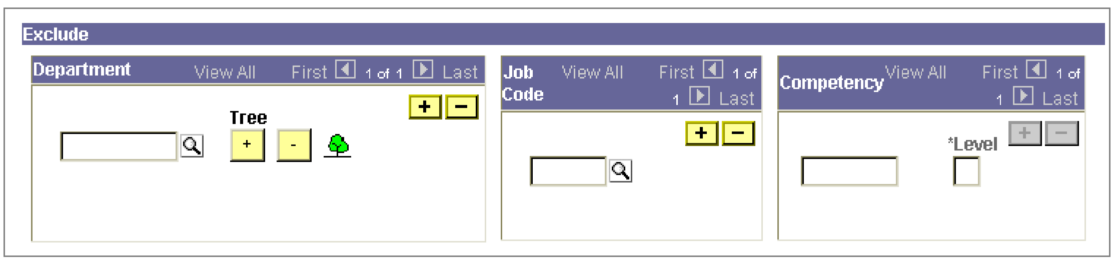
Using the Department Tree to Populate Departments

Creating a Static Profile

Access the Profile by Criteria - Profile Criteria page.



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



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

You can use this profile as a template that you can run repeatedly during the current or next budget period, to obtain a list of employees who match your selection criteria for this profile.

Description

The system displays the description that you enter here on any pages or reports that reference this profile ID, so your description should identify what this profile does.

Delayed

Select to delay processing the demand profile until later. If this check box is cleared, the system executes the profile criteria when you save the page.

Depending on your requirements, this profiling could take some time, so you might consider postponing it. If you postpone this process, you can perform it later by running the Create Delayed Profile process.

If the **Delayed** check box is cleared when you save the page, the system starts to process your search and view the number of employees who qualify. Before starting to gather the employees who match your profile template, the system displays a message about the process.

Or

In this group box, you build your employee training profile template using one or more selection criteria statements that you organize by **Criteria #** (criteria number).

Criteria #	System-displayed. The system processes your selection criteria statement-based criteria numbers, starting at ***1*** and moving sequentially through the statement list. When you define a new profile, the system sets **Criteria #** to ***1,*** to indicate the first criteria statement. Enter a new criteria number to define an additional profile criteria statement. **Note**. 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 number.
Link with Competencies	Select to include competencies as part of your criteria statement. When you select this check box, the system makes the **Competency** fields available for entry.

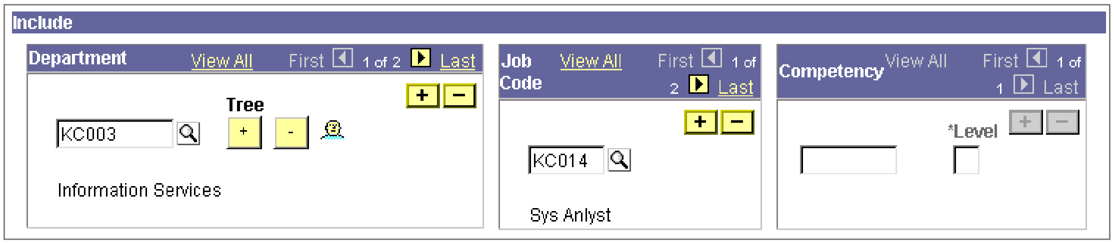
Include and Exclude Group Boxes

Department and **Job Code**	Select the department and job code that you want to include in or exclude from the profile
Competency	Enter the competency that you want to include in or exclude from the profile, and select a competency rating of ***Level.*** **Note.** 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.

To include both the department that you specify and its child departments in the department **Tree,** use the **Expand** or **Collapse** button.

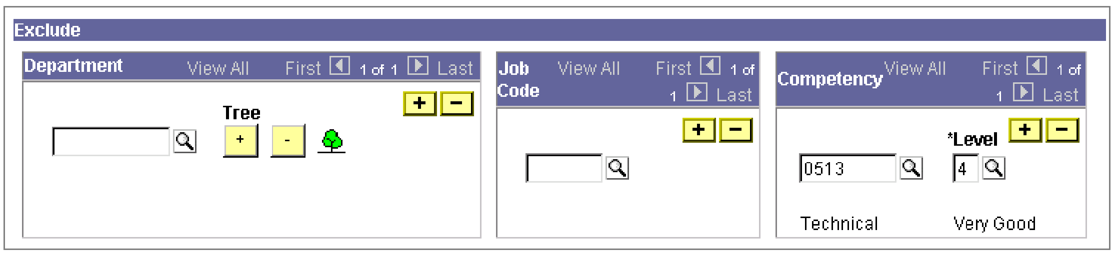
How the Criteria Affect Profile Processing

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



Include criteria statement

You exclude employees that have a high rating (level *4*) in competency ***0153,*** Technical Knowledge, as follows.



Exclude criteria statement

Note. Save the contents of this page and execute the profile process to view the selection results on the Profile by Criteria - Profile Selection page.

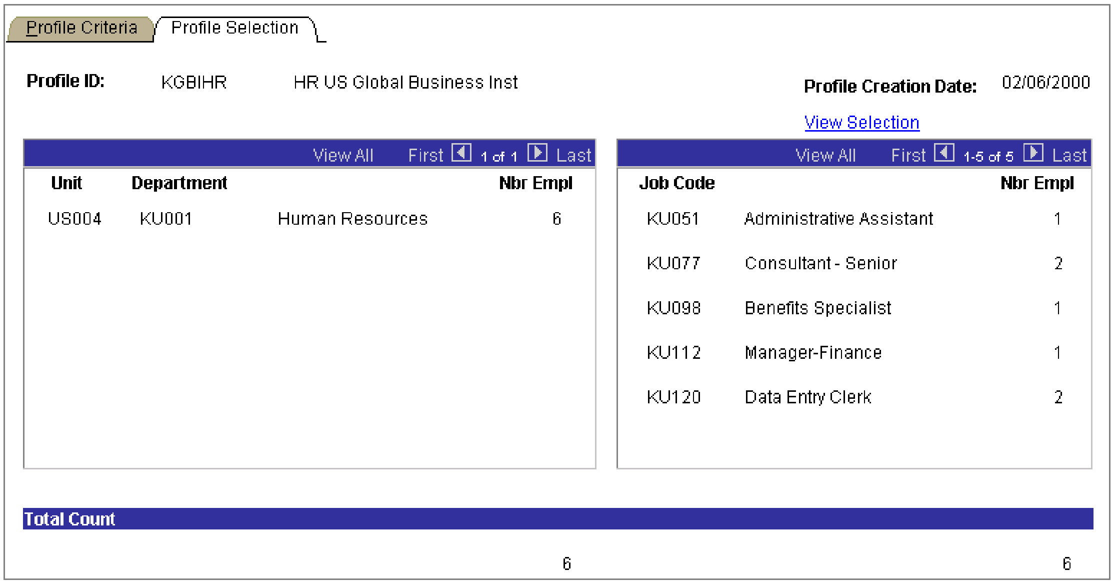
See Also

PeopleSoft Human Resource PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments"

Using the Department Tree to Populate Departments

Viewing the Selection Results

Access the Profile by Criteria - Profile Selection page.



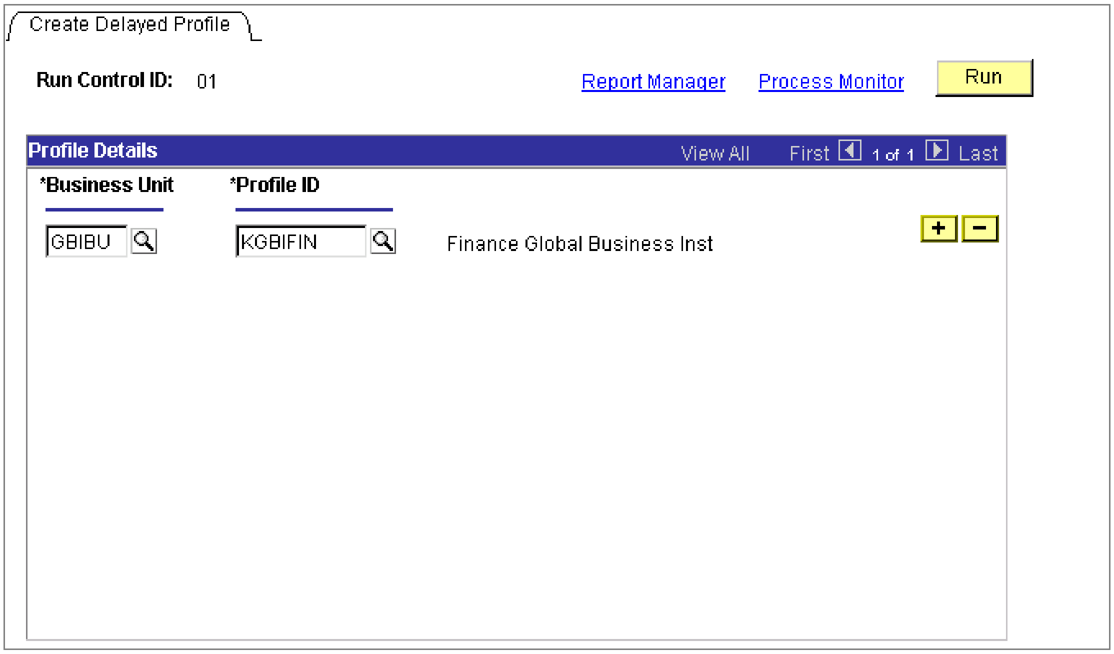
Profile by Criteria - Profile Selection page

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.

Profile Creation Date	Displays the date that it last processed this profile ID. When you rerun the process, the system updates this field.
Nbr Empl (number of employees)	Displays the 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.
Total Count	Displays the total number of employees that match each profile criterion for this profile ID.

Creating the Delayed Profile Page

Access the Create Delayed Profile page.



Create Delayed Profile page

Profile ID	Select the profile ID from the list of demand profiles that you created on the Profile Criteria page.
Run	Click this button to run this request. PeopleSoft Process Scheduler runs the Create Delayed Profile process at user-defined intervals.

Defining Global, Departmental, and Employee Training Demands:

You determine global, departmental, and employee training demands as follows

- For global training demands, determine the number of employees in your organization that need training in a certain course.
- For departmental training demands, determine the number of employees in a department that need training in a certain course.
- For employee training demands, identify the training needs of a particular employee by category, subcategory, and course.

Pages Used to Define General, Departmental, and Employee Training Demands

Page Name	***Object Name***	***Navigation***	***Usage***
General Demand	TRN_DEMAND_GNRL_1	Develop Workforce, Budget Training (GBL), Use, General Demand, General Demand	View course details and general information about the demand, including the demand priority and the originator of the demand. To use this page you must first set up the Budget Periods on the Budget Period Table page.
General Demand - Training Population	TRN_DEMAND_GNRL_2	Develop Workforce, Budget Training (GBL), Use, General Demand, Training Population	Define the group of people who need training in the course that you selected on the General Demand page. You must set up employee training costs and budgets before you can set up training demands.
General Demand - Profile Template	TRN_PROF_TMPLT_SEC	Develop Workforce, Budget Training (GBL), Use, General Demand, Training Population Click the Use Profile as a Template link on the General Demand – Training Population page.	Specify the profile to use to populate the General Demand page.
General Demand – Country	TRN_DPT_DMD_SEC	Develop Workforce, Budget Training (GBL), Use, General Demand, Training Population Click the department name link on the General Demand - Training Population page.	Enter country-specific department information that is required for the general demand that you have set up on the Training Population page.

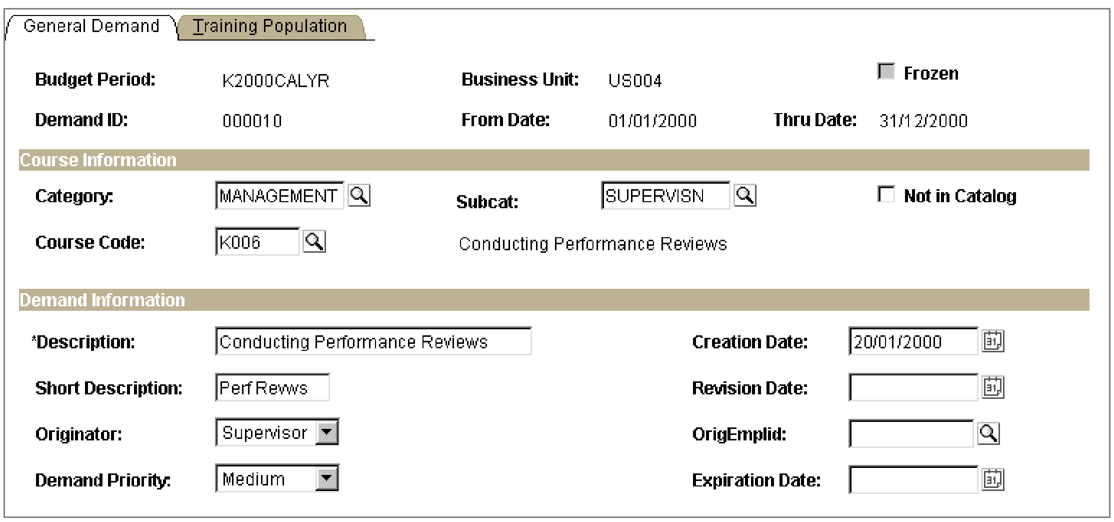
Page Name	***Object Name***	***Navigation***	***Usage***
Department Demand	TRN_DEMAND_DEPT	Develop Workforce, Budget Training (GBL), Use, Department Demand, Department Demand	Define the number of employees to be trained in a specific course or set of courses for a particular department during a specified budget period. Set up your training costs and budgets before setting up the department demands.
Department Demand -Country	TRN_DPT_DMD_SEC1	Develop Workforce, Budget Training (GBL), Use, Department Demand, Department Demand Click the Demand ID field on the Department Demand page.	Enter the country-specific department information that is required for the department demand.
Employee Demand - Employee Demand Profile	TRN_DEMAND_EE_1	Develop Workforce, Budget Training (GBL), Use, Employee Demand, Employee Demand Profile	Enter the courses that the selected employee requires during the budget period set up on the Budget Period Table page and enter audit information for the demand.
Employee Demand -Demand Details	TRN_DEMAND_EE_2	Develop Workforce, Budget Training (GBL), Use, Employee Demand, Demand Details	Enter additional employee demand details, including job code, department, and training costs.
Employee Demand by Course	TRN_DEMAND_EECRS_1	Develop Workforce, Budget Training (GBL), Use, Employee Demand by Course, Employee Demand by Course	Define the employees who require the selected training course set up on the Budget Period Table page and enter audit information for the demand.

Page Name	***Object Name***	***Navigation***	***Usage***
Employee Demand by Course - Demand by Course Details	TRN_DEMAND_EECRS_2	Develop Workforce, Budget Training (GBL), Use, Employee Demand by Course, Demand by Course Details	Enter 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.

Note. The Department Demand - Country page is identical to the General Demand - Training Population -Country page.

Defining the Training Need

Access the General Demand page.



General Demand page

Course Information

Category, Subcat (subcategory), and **Course Code**	Specify the course for that this training demand by selecting a category, subcategory, and course code. If you don't know what value to use, use the system default ***UNKNOWN.***

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

Not in Catalog

Select if the training course isn't defined in the Catalog Table.

Demand Information

Description and **Short Description**

The system populates these fields after you enter the category, subcategory, and course code. The description information appears whenever the demand ID is referenced on a page or report.

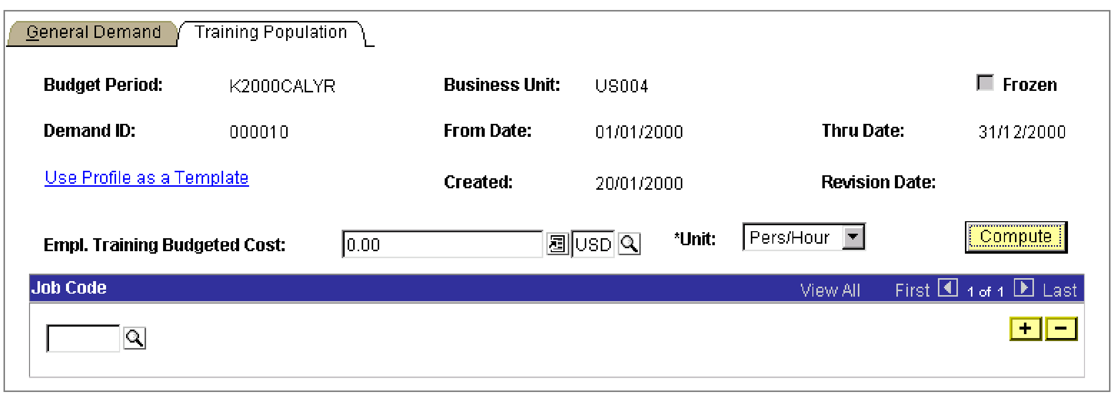
See Also

"Planning Training Budgets for Your Organization," Freezing Budgets, Moving Unapproved Demands, and Deleting Scenarios and Creating Global Scenarios

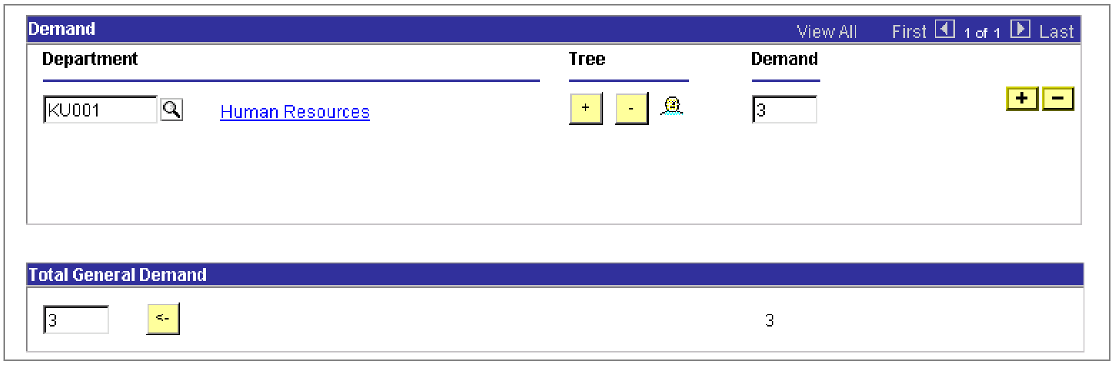
PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Your HRMS System," Setting Up Implementation Defaults

Defining the Group That Needs Training

Access the Training Population page.



General Demand - Training Population page (1 of 2)



General Demand - Training Population page (2 of 2)

On 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.

Use Profile as a Template — Click this link to import the job codes and departments that you previously set up in a profile. The system displays the page where you select the profile.

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 employee 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 calculation looks like this:

Employee Training Budgeted Cost = (Job Code Training Cost * Number of people in this Job Code) for all Job Codes entered in the Job Code field on this page / 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 converts all training costs to the base currency to calculate training costs.

Unit — The system displays the cost unit that is associated with the amount in the **Empl. Training Budgeted Cost** field.

Compute — Click this button to populate the **Empl. Training Budgeted Cost** field with the average job code salary cost figures, using the job codes that are defined in the **Job**

Code group box.

The system pulls the costs that are associated with the specified job codes from the Job Code Training Cost Table and averages the costs to get the **Empl. Training Budgeted Cost** figure. For this process to work, you must have entered the job codes for this demand and it's associated costs on the Job Code Training Cost page.

Job Code

In this 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 this job code information to calculate the average cost to train employees for this demand.

Demand

Department Select the **Department** to include for calculating the demand for this course.

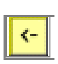
The system displays the department description. To enter country-specific information, click the department name link next to this field to view the page where you enter information required by your local country.

Demand Enter the number of the employees to be trained for each of the departments selected. This field is optional, but the more precise the information that you 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. All computed costs are based on the demand amounts that you enter here.

Total General Demand

The field in this group box is required for each population demand. The system uses the **Total General Demand** amount to calculate the average cost of training employees for this demand.



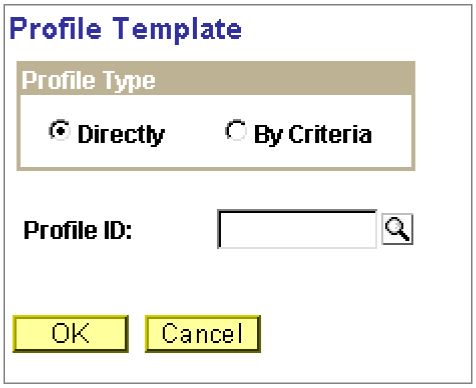
Click the **Summation** button to move the sum of the individual department demands to the **Total General Demand** field. If you make changes to the **Demand** fields, click this button to update the **Total General Demand** before you save the page.

See Also

Using the Department Tree to Populate Departments

Specifying the Profile

Access the Profile Template page.



General Demand - Profile Template page

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 page. This method is particularly useful for determining which people in your organization need to be trained based on a set of criteria.

Profile ID

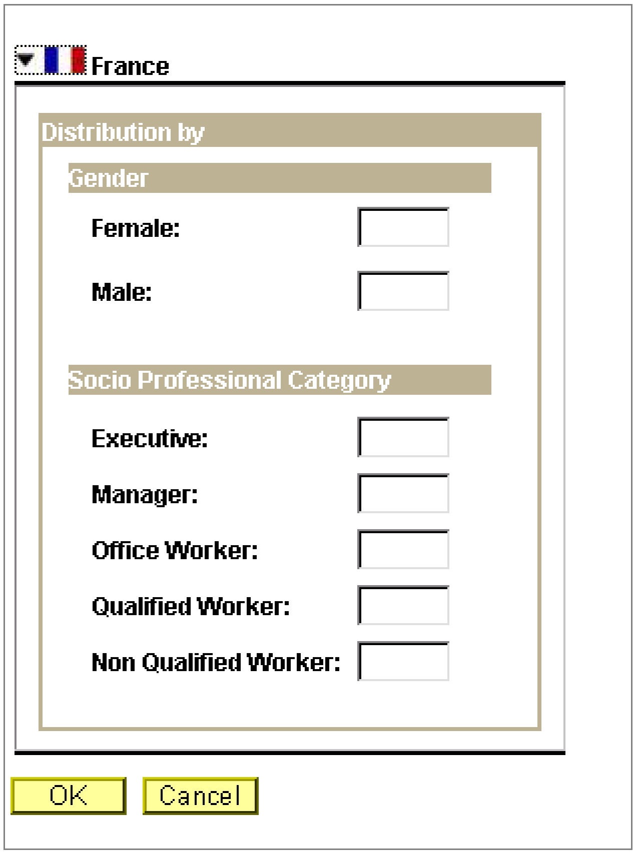
Select from the list of profiles.

OK

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. The system displays the average training cost for the profile population in the **Empl. Training Budgeted Cost** field on the General Demand page.

Entering Country-Specific Information for the General Demand

Access the General Demand - Training Population -Country page.



General Demand - Training Population - Country page

(FRA) France

Use this group box to define how your training demand divides by gender and professional category. The sums of the entries in the two group boxes on this page must equal the total general demand that you specified on the Training Population page.

Gender

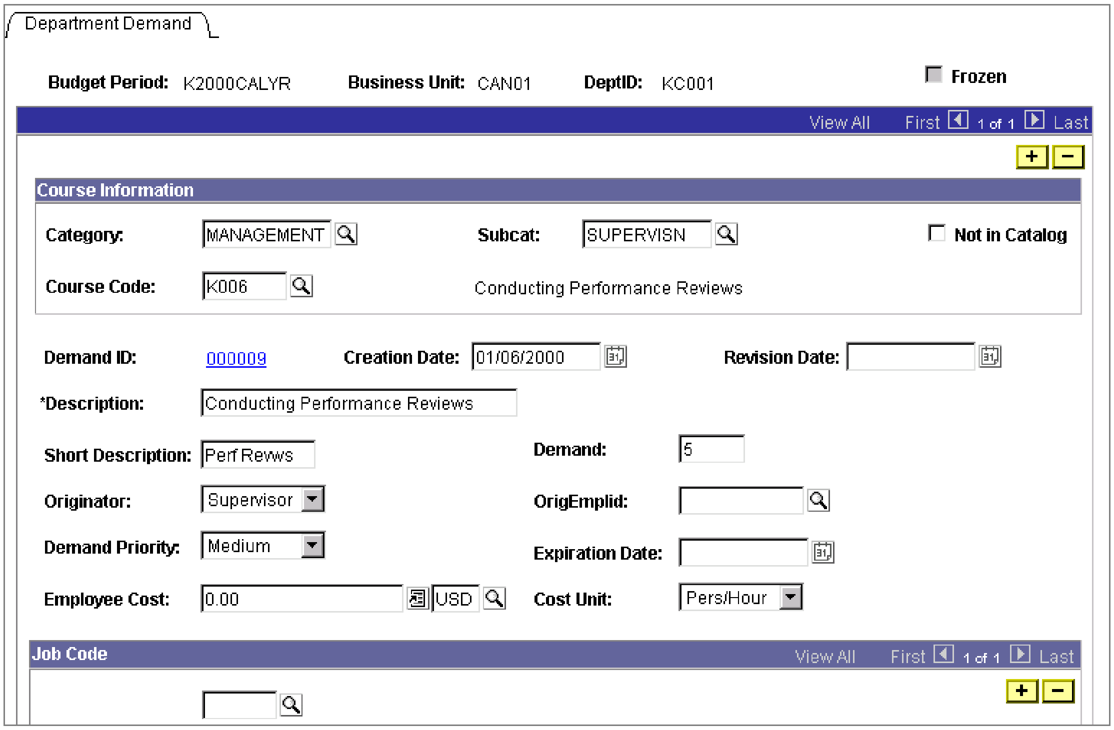
Enter the number of female and male employees who make up the demand shown on the Training Population page.

Socio Professional Category

In the field for each category, enter the number of employees who make up the demand for that category on the Training Population page.

Defining the Number of Employees in a Department

Access the Department Demand page.



Department Demand page

The system displays the **Budget Period, Business Unit,** and **DeptID** (department ID) that you selected.

Course Information

Specify the course for this training demand. If you don't know the **Category, Subcat,** or **Course Code,** use the system default ***UNKNOWN.***

Category and **Subcat** — Select the category and subcategory for the course.

Course Code — Select the code from the list of course codes.

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

Not in Catalog — Select if the training course isn't defined in the Catalog Table.

Demand — Enter the number of employees in the selected department that need to take the training course.

Employee Cost — Enter the **Employee Cost** (employee training cost) and the currency it is tracked in. This cost is 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

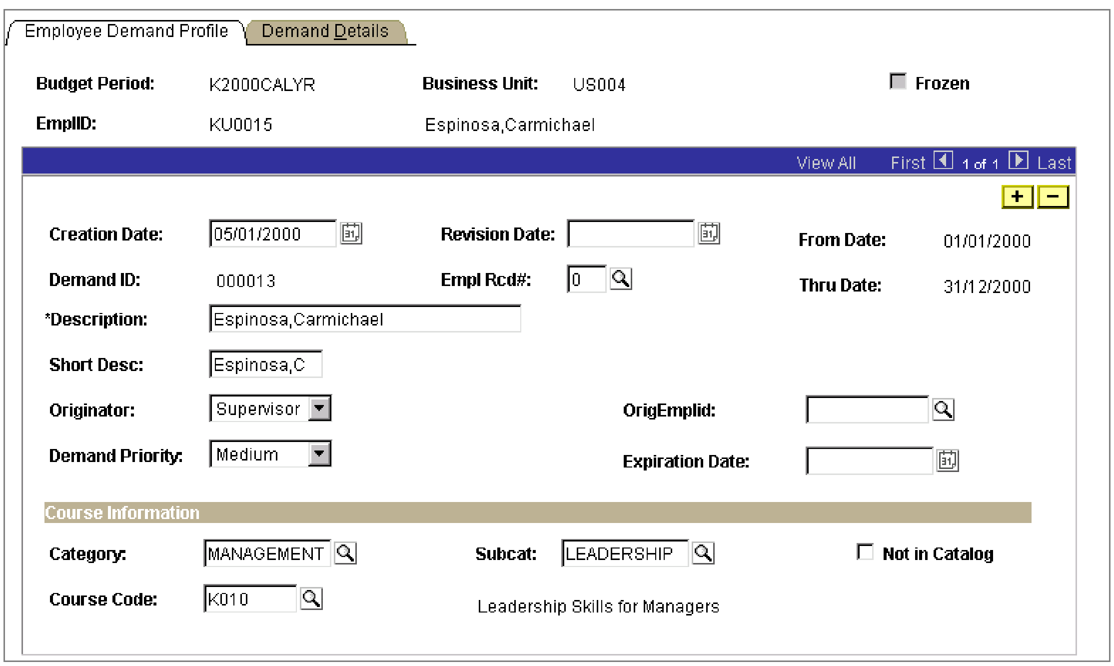
	default base currency for your organization that you establish on the Base Currency page.
Cost Unit	Select the cost unit that is associated with the amount in the **Employee Cost** field.
Job Code	Before calculating your employee cost, you can select one or more job codes for the system to use for calculating 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 to calculate the Employee Training Cost. The system takes an average of the costs for all job codes that you specify.

See Also

"Planning Training Budgets for Your Organization," Creating Global Scenarios

Entering Courses for an Employee

Access the Employee Demand Profile page.



Employee Demand Profile page

The system displays the **Budget Period, Business Unit,** and **DeptID** (department ID) that you selected.

Course Information

Specify the course that this training demand applies to. When you first enter this page, the **Course Information** values are ***UNKNOWN*** (the default).

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.

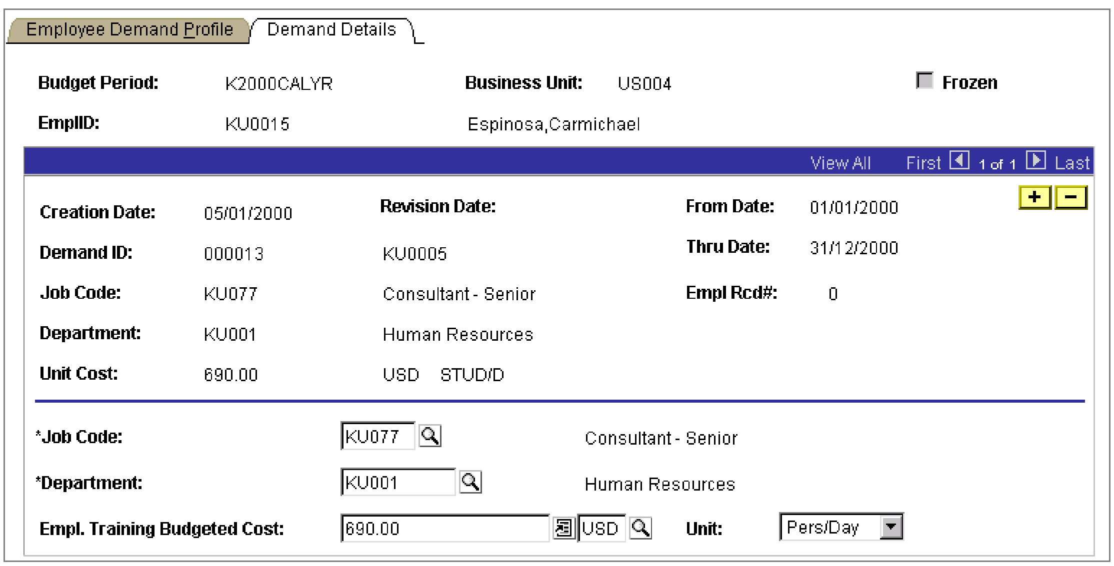
Category and **Subcat**	Select a category and subcategory. **Note.** You cannot select a subcategory code until you've selected a course category.
Course Code	Select a course code. If you aren't sure which course this demand is for, select the category and subcategory codes and leave this field blank.
Not in Catalog	Select if the training course isn't defined in the Catalog Table.

See Also

"Planning Training Budgets for Your Organization," Creating Global Scenarios

Entering Additional Employee Demand Details

Access the Employee Demand Details page.



Employee Demand Profile - Demand Details page

Job Code, Department, and **Empl. Training Budgeted Cost**	The system populates these fields from the employee's job data. You can select a job code, department, or employee training budgeted cost if it is different from the values that are currently defined for this employee, for budget purposes. You might want to do this if know 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.

For **Empl. Training Budgeted Cost,** 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).

Unit

Select the cost unit for the value in the **Empl. Training Budgeted Cost** field. This is the cost to train the employee with respect to the employee's wages. Values are:

Pers/Hours: If the cost unit is the employee's hourly wage.

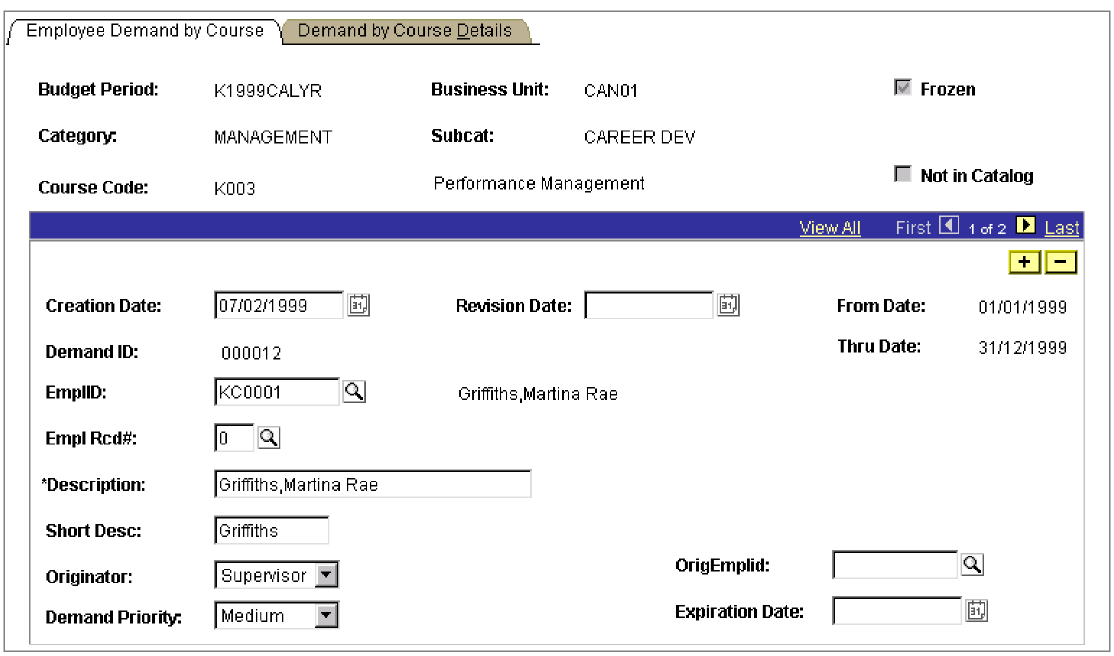
Pers/Day: If the cost unit is based on what the employee earns in a day.

See Also

"Setting Up Training Costs," Setting Up the Training Cost Currency

Defining Employees Who Require a Selected Training Course

Access the Employee Demand by Course page.



Employee Demand by Course page

Not in Catalog

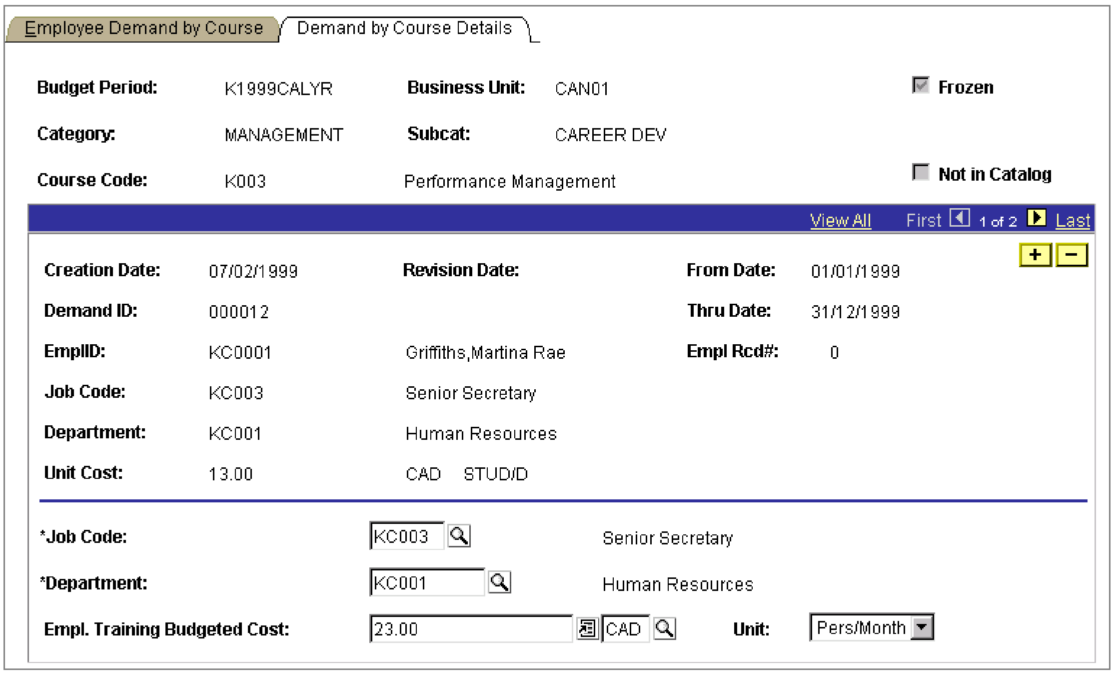
This check box is selected by default if the training course hasn't been defined in the Catalog Table.

EmplID (employee ID)

Select the ID of the employee who is taking the specified course. Insert a row for each employee who needs to attend the course. Employees can come from any department that is associated with the specified business unit.

Entering Additional Employee Details by Course

Access the Demand by Course Details page.



Employee Demand by Course - Demand by Course Details page

Job Code, Department

You can select a different job code or department for this employee for this training demand and budget period. You might do this if you know that the employee's details will be different in a future budget period; for example, the employee is transferring to another department and job during the budget period, resulting in a different budgeted cost for employee training.

Empl. Training Budgeted Cost (employee training budgeted cost)

Enter an employee training budgeted cost and select the currency that the cost is tracked in.

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 that you establish on the Training

Base Currency Table (TRN_BASE_CURRENCY).

Unit

Select the cost unit for the cost that you entered in the **Empl. Training Budgeted Cost** field. This is the cost to train the employee with respect to the employee's wages. Values are:

Pers/Hour: The cost is the employee's hourly wage.

Pers/Day: The cost is based on what the employee earns in a day.

CHAPTER 6

Planning Training Budgets for Your Organization

This chapter provides an overview of the training planning process and tells you how to:

- Create department scenarios.
- Create global scenarios.
- Activate scenarios and view scenario summaries.
- Track training plans.
- Freeze training budgets, move unapproved demands, and delete global scenarios.

Understanding the Training Budget Planning Process

Once you know how many employees need to take each training course, you can determine the total cost of those demands. Then you can compare the cost of the training demand to your proposed departmental training budget.

This chapter describes how to use the budgetary scenarios (budgetary plans) that are provided in PeopleSoft Human Resources to help plan budgets, approve demands, and track and freeze budgets. You can define as many scenarios as you need for different budgetary training plans.

Using budgetary scenarios, you can:

- Set the level of employee demand that you can afford during a budget period.
- Perform what-if analyses to determine which budget plan works best for your organization.
- Create virtual training plans to simulate the effect of one plan verses another as if it were being implemented in the real world.
- Activate the plan which best meets training demands and budgets. This plan defines the Training Plan for the related period.

Common Elements Used in This Chapter

Active New Scenario — Select if the new or displayed global scenario is to be or is now the active scenario.

Note. Only one scenario can be the active scenario for each budget period and business unit, though you can have more than one scenario in your Budget Training system.

New Scenario — Enter the name of your new scenario (10-character maximum).

Not in Catalog — Select if the course isn't in the Catalog Table.

Run — Click this button to run the request. PeopleSoft Process Scheduler runs the process at user-defined intervals.

Sort by — To change the order in which information is listed, select one of these values:

Demand: Sorts demands by the number of requested demands

Approved: Sorts demands according to the number entered in the Approved field.

How the Scenario Process Works

PeopleSoft Human Resources compiles all general (corporate), departmental, and employee training demands to determine your overall training needs. It uses this data to build an initial scenario the first time that you use the Adjust Department Demand component. This scenario is active, and the system loads the demands that are associated with it into a training plan.

You can adjust your organization's training demands to create a demand profile for each scenario.

Working With Department and Global Scenarios

You can create new scenarios, by starting from an active scenario at the department level or by combining all active department scenarios into one global scenario for your entire organization. This gives you the *big picture* of your training demand, costs, and budget.

Using department-level scenarios works best for large organizations that plan training budgets at the department level to capture the level of budgetary detail needed to develop a training budget. More centralized or smaller organizations may find that it's more efficient to work with global scenarios.

You can narrow the scope of the training demands that the system includes in the training plan at each department level or at the general (organization-wide) scenario level.

Freezing a Scenario

You can evaluate your training plan through successive iterations of simulation by business unit, creating and activating new scenarios to see how they affect the training plan. Once you decide on the right combination of demand and money, you can freeze the final budgetary scenario to end the evaluation process for the budgetary period and establish your organization's training budget.

See Also

Freezing Budgets, Moving Unapproved Demands, and Deleting Scenarios

How the System Calculates Training Element Costs

When you define an expense that is associated with a training element (like a vendor, a facility, or an instructor), you specify the amount, the currency (which is 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
- TRN_CST_ELEMENT

The training element costs are then associated with a course or a catalog element that specifies the duration, in hours, or days, or weeks, etc., for a course 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 this on the Cost Element Table so that these amounts are ready to use on the Adjust Department Demand pages. The system also converts the cost to the base currency that is specified for the business unit in the Budget Period Table.

To arrive at the cost that appears 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 affect the computed cost calculation.

Using Session Padding to Determine Session Demand

When you define course and catalog costs, you enter a cost unit for each per-unit cost. The cost unit specifies how the cost is 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 Cost and Duration aren't student-dependent, the number of course sessions that need to be opened to accommodate your estimated training needs must be included in the cost formula. The system needs the number of students by course (or by category and subcategory) to calculate the cost.

However, to budget costs by using the number of students that are specified by the demand is not a reliable method because this information is based on an *estimate*d number of students.

For example:

The maximum number of students allowed in a course session is 10.

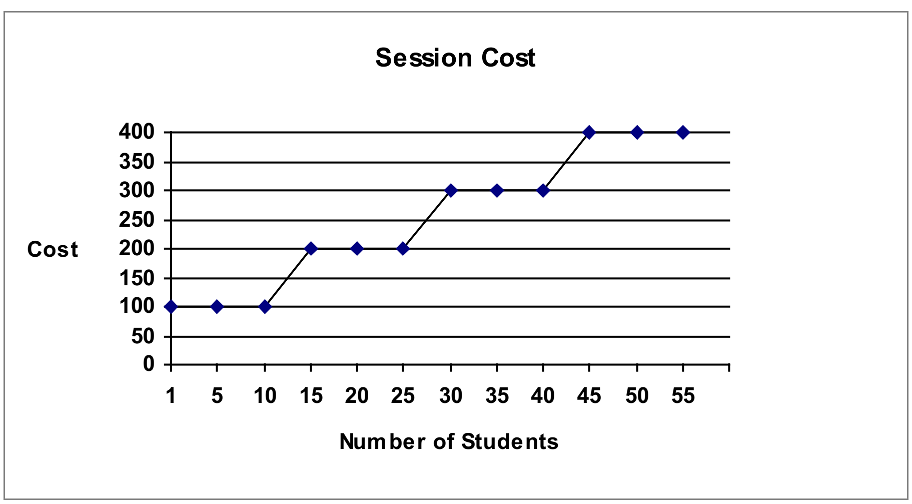
1. You plan to train 5 students.
2. You add 5 more students to your budget plan.

   The training cost doesn't change.
3. You add another student to the demand.

   The training cost doubles.

Based on your current information, which isn't reliable because it represents an estimated number of students per course, the computed training cost can differ dramatically due to a minor change in just one variable.

The following graph shows the relationship of cost to the expected number of students that need to take a course.

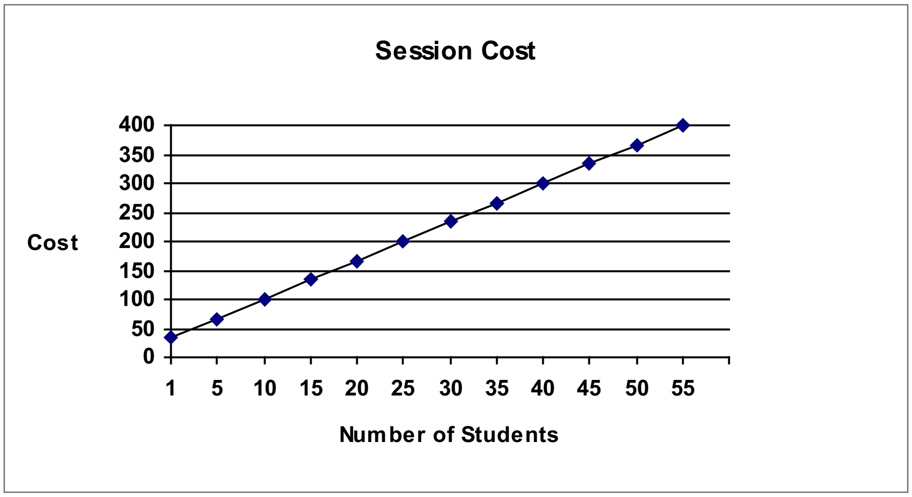


Unweighted session costs based on number of employees in a training demand

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

Number of students planned / Maximum number of students per course

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



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

---

Note. The system applies the "session-padding" factor to calculate course session costs that are not student-dependent (flat costs and duration-dependent costs).

How Cost Units Affect Budget Cost Calculations

When 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, multiplied by the day annuity factor divided by the hourly annuity factor, and then multiplied by the Session Factor.
Week	Converted to the Base Currency, multiplied by the Course Duration, multiplied by the week annuity factor, divided by the hourly annuity, and then multiplied by the Session Factor.

Cost Unit	Cost Computation Detail
Month	Converted to the Base Currency, multiplied by the Course Duration, multiplied by the month annuity factor, divided by the hourly annuity factor, and then multiplied by the Session Factor.
Year	Converted to the Base Currency, multiplied by the Course Duration, divided by the hourly annuity factor 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, multiplied by the month annuity factor, and divided by the hourly annuity factor (number of hours in a business day).
Pers/Year	Converted to the Base Currency, multiplied by the Number of Demands, multiplied by the course duration, then divided by the hourly annuity factor.
Pers/Train	Converted to the Base Currency, multiplied by the Number of Demands.

Note. Cost elements are updated as soon as training element costs are entered. If you change the annuity factor during a budget period, costs already computed are not impacted. The annuity factor should be set before entering any costs in the system.

See Also

"Setting Up Training Costs," Setting Up the Training Cost Currency

Creating Department Scenarios

Using the Adjust Department Demand component, you can:

- Create budget plan scenarios for your organization for a particular budget period.

  You work on training budget scenarios one department at a time. The first time that you adjust your department demand, the system generates a *BASE* scenario that is based on the demands that you set up. As you adjust the demand further, you create new scenarios.

- Calculate computed costs of training and compare them to the budgeted amount for a scenario.

- Determine how many employees the department can afford to train during a specified budget period.

The information that you enter on these pages is stored in the TRN_SIMULATION and TRN_SCENARIO tables.

This section describes how to:

- Develop a training plan scenario and adjust department demand IDs.
- Enter country-specific department information.
- Review training component cost details.

See Also

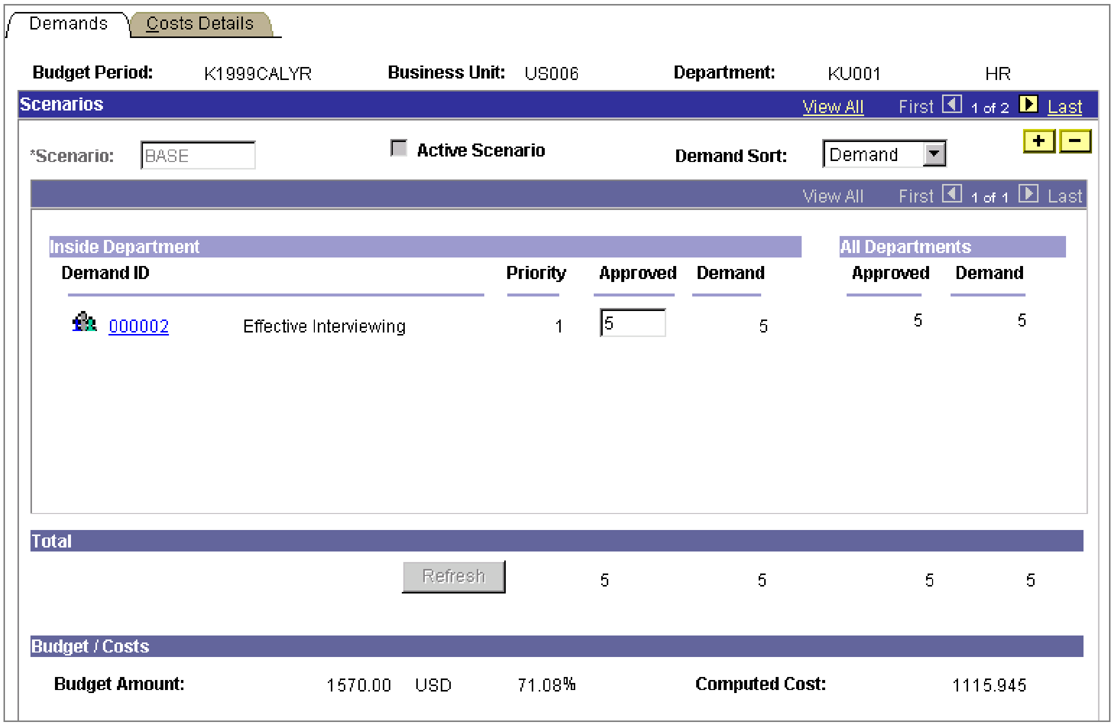
"Defining Training Requirements," Defining Departmental Training Demands

Pages Used to Create Department Scenarios

Page Name	***Object Name***	***Navigation***	***Usage***
Adjust Department Demand - Demands	TRN_ADJ_DEM_TABLE	Develop Workforce, Budget Training (GBL), Use, Adjust Department Demand, Demands	Develop a training plan scenario and make adjustments for each of your demand IDs by department.
Adjust Department Demand - Demands - Country	TRN_DPT_DMD_SEC2	Develop Workforce, Budget Training (GBL), Use, Adjust Department Demand, Demands Click the Demand ID link on the Adjust Department Demand - Demands page.	Enter the country-specific department information that is required for the demand.
Costs Details	TRN_SML_COST_TABLE	Develop Workforce, Budget Training (GBL), Use, Adjust Department Demand, Cost Details	View the training component costs (such as equipment, vendors, and facilities) that make up your computed cost.

Developing a Training Plan Scenario

Access the Adjust Department Demand - Demands page.



Adjust Department Demand - Demands page

Scenario

Indicates the scenario on which the simulation is being performed. The system creates an initial ***BASE*** scenario when you first open this page.

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

If this scenario is the active scenario, this check box is selected by default.

The training plan is the combination of all active scenarios from all concerned departments so, only one scenario at a time can be active for each budget period, business unit and department, 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 sort order from the available options:

Demand: Sorts by demand ID.

Approved: Sorts according to the number that you enter in the **Approved** field.

Priority: Sorts by the priority that you specified on the demand pages.

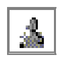
Inside Department

The system builds scenarios using *all* training demands in your PeopleSoft Human Resources system that are associated with the business unit, budget period, and department that you selected. The system also displays the employee demands that are associated with the selected department.

Note. Employees in one department can be included in many different training demands because category, subcategory, and course code generate demands. Similarly, one department can be included in many different training demands.

Demand ID

Displays the demand ID and its description. The symbol next to the **Demand ID** field indicates the type of demand that you are working with:

 An employee demand.

 A general (corporate) demand.

Note. To enter country-specific information, click the link containing the demand ID.

Priority

Displays a numeric value that is associated with the priority that you assigned to the demand:

1 = High priority.

2 = Medium priority.

3 = Low priority.

Approved

Enter the number of employees for each demand to include in your training budget.

You can approve more employees for training for a demand ID than are included in the demand; for example, to add extra budgeting to account for additional department costs for new or transferred employees.

Click the Refresh button and the system adjusts total or summary amounts.

Demand

Displays the total demand that you specified for the selected demand ID.

All Departments

Approved

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

Displays the total number of demands for the specified budget period for all departments.

Total

This group box shows a running total of approved demands and the total number of requested demands, by department, for all departments.

Refresh — Click this button to update the total demands for the selected department.

Budget/Costs

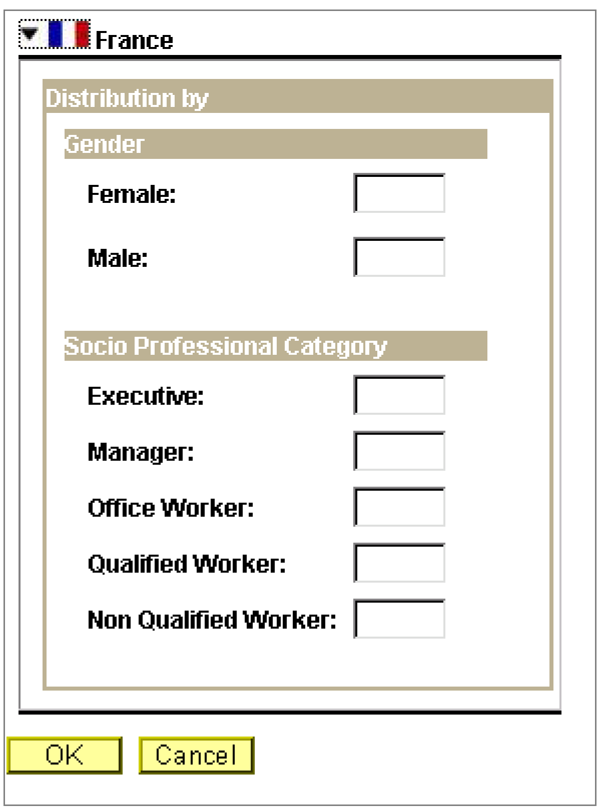
This group box compares the **Budget Amount** value to the **Computed Cost** value, based on the selected demands, and displays the percentage of the budget amount that the computed cost represents.

Budget Amount — The budget amount for this budget period appears by default from the Department Budget Table page.

Computed Cost — The system calculates the cost of the training for the department, based on the approved demands.

Entering the Country-Specific Department Information

Access the Adjust Department Demand - Demands - Country page.



Adjustment Department Demand - Demands - Country page

(FRA) France

Use this group box to define how your training demand divides by gender and professional category. The sums of the entries in the two group boxes on this page must equal the total general demand that you specified on the Adjust Department Demand - Demands page.

Gender

Enter the number of female and male employees who make up the demand shown on the Adjust Department Demand - Demands page.

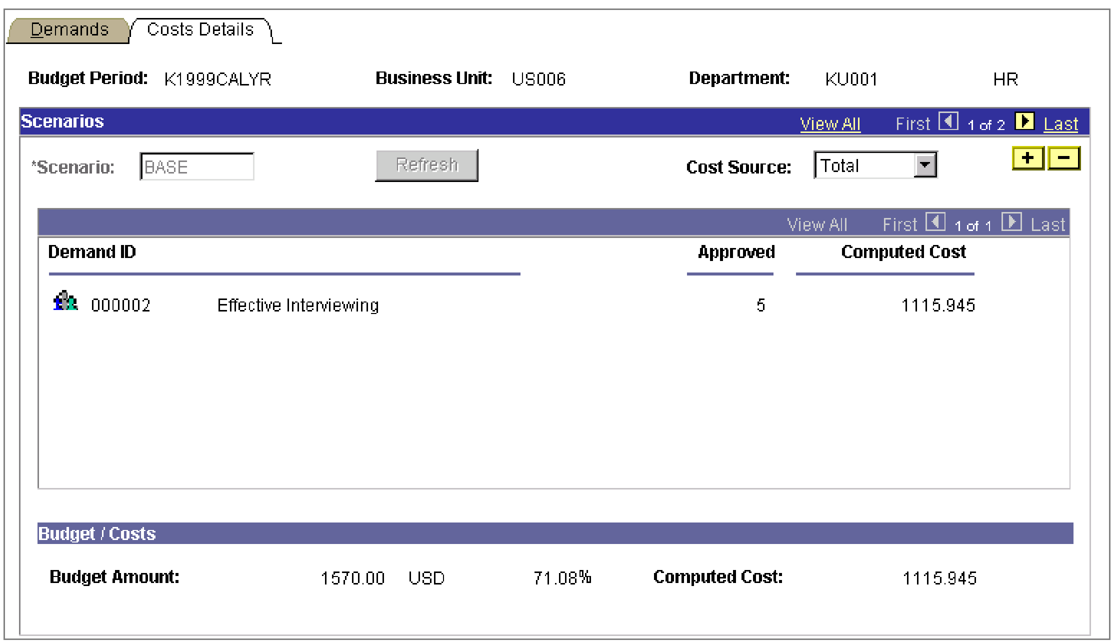
Socio Professional Category

In the field for each category, enter the number of employees who make up the demand for that category.

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

Viewing the Training Component Costs

Access the Adjust Department Demand - Costs Details page.



Adjust Department Demand - Costs Details page

Scenarios

Scenario	Displays the scenario that you selected on the Adjust Department Demand - Demands page.

Cost Source	Select a cost source to view a breakdown of the costs for a particular training component. Values 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 equipment cost for all demand IDs to the Budget Period Budget Amount and the percentage of the budget that is represented by your equipment costs.
Demand ID	For each demand ID, the system displays the approved demand and computed cost for the cost type that is specified in the **Cost Source** field.

Budget/Costs

In this group box, you compare the Budget Amount value to the Computed Cost value for each training element or to the total cost of all elements.

Note. The total Budget Amount value that appears is the allocated budget amount from the Department Budget Table for this department and budget period only.

Creating Global Scenarios

For smaller or more centralized organizations, you can define your training plan by using global (organization-wide) scenarios. When you create global scenarios, you limit their scope by defining special criteria that tell the system what to include in each scenario. For example, you can limit the scope of a global scenario by excluding certain demands. You can increase the demands in a new scenario by multiplying the approved headcount in existing demands by a user-specified factor.

Options for creating global scenarios:

- Using selection criteria.
- Copying existing scenarios.

Note. 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.

This section describes how to:

- Create global scenarios by using selection criteria.
- Include and exclude departments, job codes, and competencies.
- Write selection criteria for a global scenario.

- Create a scenario by copying an existing scenario.

See Also

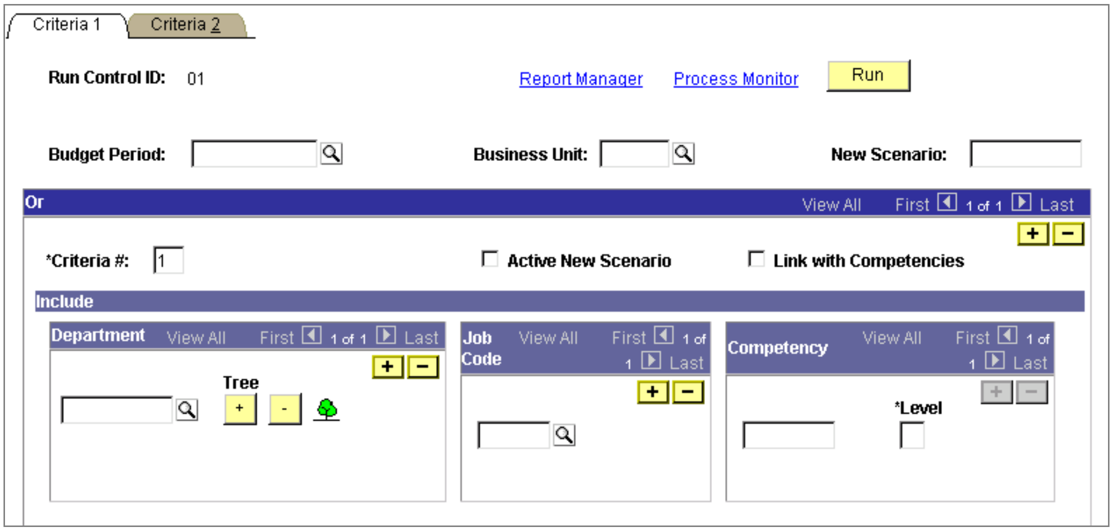
PeopleTools PeopleBook: Process Scheduler

Pages Used to Create Global Scenarios by Selection Criteria

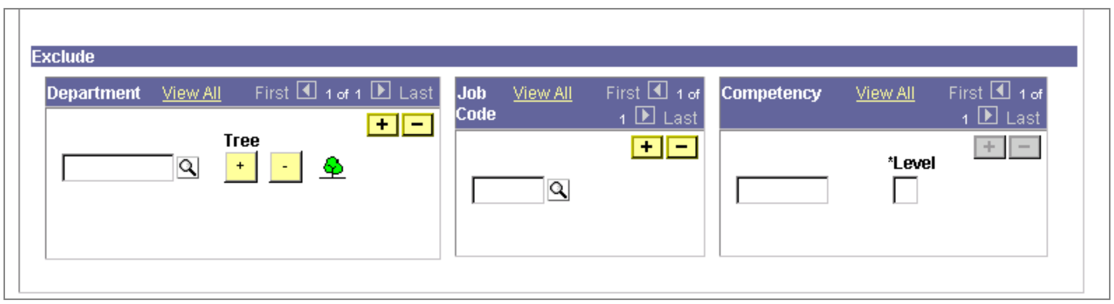
Page Name	***Object Name***	***Navigation***	***Usage***
Create Scenario By Criteria - Criteria 1	RUNCTL_TRN008_1	Develop Workforce, Budget Training (GBL), Process, Create Scenario By Criteria, Criteria 1	Include or exclude departments, job codes, and competencies for a budget period and business unit in the global scenario.
Create Scenario By Criteria - Criteria 2	RUNCTL_TRN008_2	Develop Workforce, Budget Training (GBL), Process, Create Scenario By Criteria, Criteria 2	Write criteria to specify courses to include in the scenario.
Create Global Scenario	RUNCTL_TRN007	Develop Workforce, Budget Training (GBL), Process, Create Scenario	Create a scenario by copying a global or active scenario that you previously created for another budget period or business unit.

Including and Excluding Departments, Job Codes, and Competencies

Access the Create Scenario by Criteria - Criteria 1 page.



Create Scenario by Criteria - Criteria 1 page (1 of 2)



Create Scenario by Criteria - Criteria 1 page (2 of 2)

Budget Period and **Business Unit**: Select a budget period and business unit to associate with the new global scenario.

New Scenario: Enter the name of your new scenario (10-character maximum).

Or

Criteria # (criteria number): When you open the page, the system specifies that your first criteria number (selection statement) is ***1.***

You can enter multiple inclusion or exclusion statements. The system processes the statements in order based on their criteria number. This order can seriously affect the result of your Create Scenario by Criteria process, so carefully consider how you organize your statements.

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.

Link with Competencies

Select if you want to include competencies as part of your criteria statement. The system makes the **Competency** fields available for entry.

Competency

Select the competency and select a competency rating in the **Level** field.

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 statements.

Include

Department, Job Code, and **Competency**

Select the department, job code, and competency to include in the scenario.

To include both the department and its child departments (on the department tree), use one of the buttons below the **Tree:**

+

Click the **Expand** button to automatically add related departments that are specified in the department tree to the list on this page. Then you can 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.

Exclude

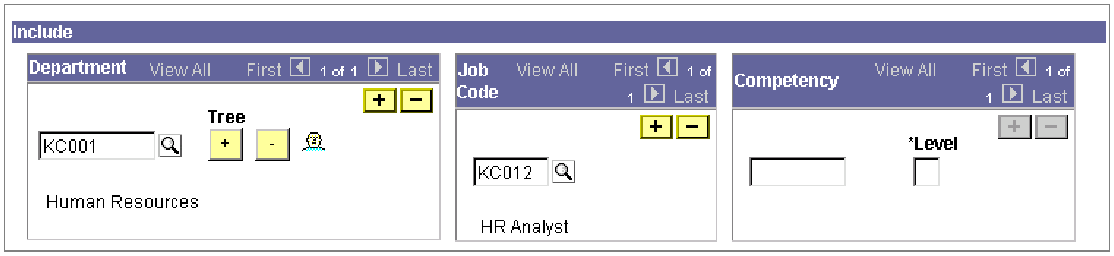
Department, Job Code, and **Competency**

Select the department, job code, and competency to exclude from the scenario. Use the **Expand** and **Collapse** buttons to add departments to or remove departments from your department tree.

Note. 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.

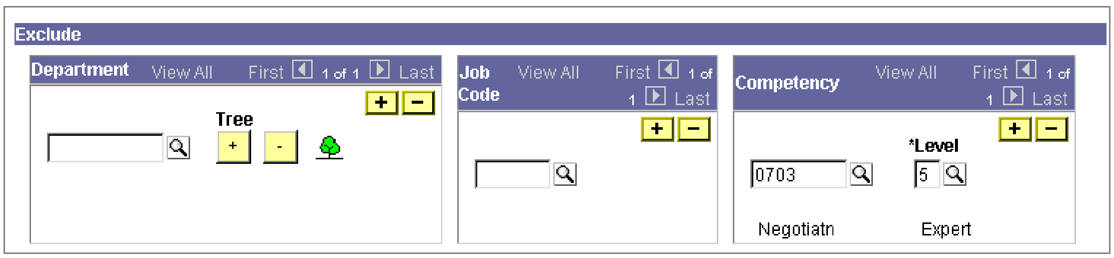
How Criteria Statements Include or Exclude Employees From a Demand

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 Competency ***0703,*** Negotiation, as follows:



Excluding criteria statement

Note. You can opt *not* to enter a department, job code, or competency in a criteria statement. For example, if you don't specify a job code in the Exclude criteria statement, the system excludes any employee in Department 10600 with an Expert Level rating in Competency 0155.

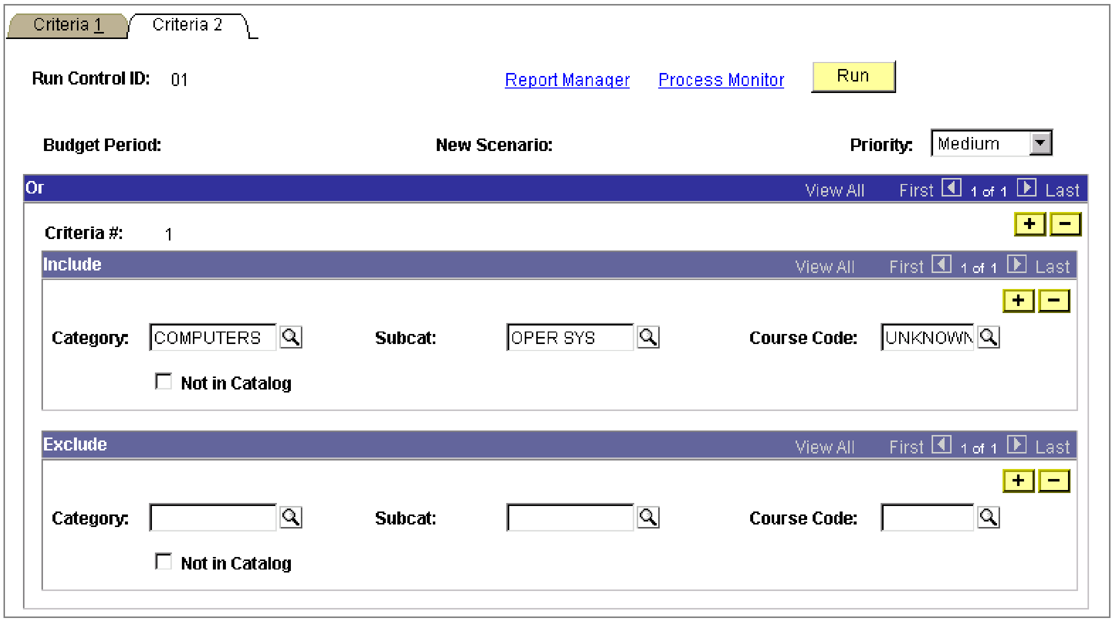
See Also

Using the Department Tree to Populate Departments

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Setting Up Competencies and Accomplishments"

Writing Selection Criteria for a Global Scenario

Access the Create Scenario by Criteria - Criteria 2 page.



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

Category, Subcat (subcategory), and **Course Code**	Select the category, subcategory, and course code. In the **Course Code** field, select a course that is associated with the category and subcategory that you select.

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 in the Course Cost Table.

For example, if you include the category ***COMPUTERS,*** the subcategory ***OPER SYS*** (operating systems), and the course code ***4002, DOS/Windows Operating System,*** the global scenario includes all the demands that you have for that course.

Exclude

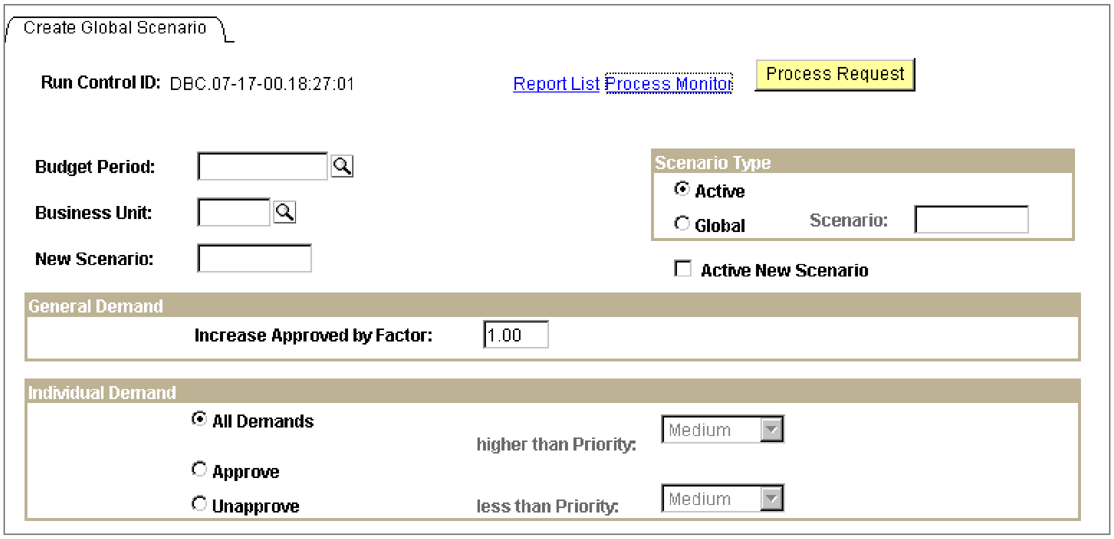
Category, Subcat (subcategory), and **Course Code**	Select the category, subcategory, and course code. In the **Course Code** field, select a course that is associated with the category and subcategory that you select.

See Also

PeopleTools PeopleBook: Process Scheduler

Creating a Global Scenario by Copying Another Scenario

Access the Create Global Scenario page.



Create Global Scenario page

Budget Period and **Business Unit** — Select the budget period and business unit to be associated with your new scenario.

New Scenario — Enter an ID for the new scenario.

Scenario Type

Active — Selects the current active scenario for the specified business unit. You can have only one active scenario for a specified budget period.

Global — If you select **Global,** also select a global scenario that you've already defined as the source for the new scenario.

Note. If the budget period that you specified is frozen, then you cannot make the global scenario that you're defining here the active scenario. If you try to do so, you get a warning message when you save the page.

General Demand

Increase Approved by Factor — Enter a multiplier:

- 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,*** and your source scenario specifies 100 approved demands, then

the new global scenario will have 75 approved demands when the build process is done. To double your approved demands, enter ***2.*** The result will be 200 approved demands in your new scenario.

Individual Demand

Use this group box to specify which employee demands to include in your new global scenario.

All Demands	Select to copy existing employee demands.
Approve	Select to copy approved demands to the new scenario.
higher than Priority	If you select **Approve**, select a priority in this field to copy approved demands that are higher than the selected priority. Values are ***Low, Medium,*** and ***High.*** For example, if you select ***Low,*** the system includes all ***Medium*** and ***High*** priority demands.
Unapprove	Select 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.
less than priority	If you select **Unapprove,** select a priority for copying unapproved demands that are lower than the selected priority.

Note. You establish demand priority for employees by using the Employee Demand page and the Employee Demand by Course page.

See Also

PeopleTools PeopleBook: Process Scheduler

Activating a Scenario and Viewing Summaries

This section describes how to activate scenarios and view summaries of them.

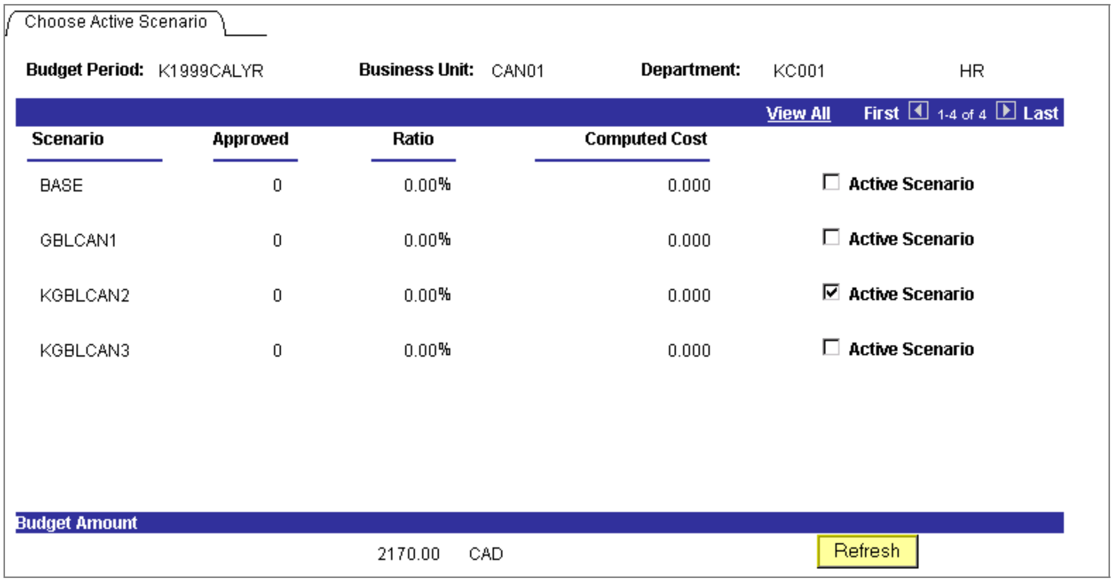
Pages Used to Activate Scenarios and View Summaries

Page Name	***Object Name***	***Navigation***	***Usage***
Choose Active Scenario	TRN_ADJ_SCE_TABLE	Develop Workforce, Budget Training (GBL), Use, Choose Active Scenario, Choose Active Scenario	Select the scenario to activate. You can work only with the active scenario on the Adjust Department Demand pages.
Scenario List	TRN_LST_SCE_TABLE	Develop Workforce, Budget Training (GBL), Inquire, Set Global Scenario Active, Scenario List	Make a global scenario your active scenario for a budget period and business unit.
Approved in Active Scenario - Approved by Demands	TRN_ADJ_DEP_TABLE	Develop Workforce, Budget Training (GBL), Inquire, Approved in Active Scenario, Approved by Demands	View the approved demands for the active scenario.
Approved in Global Scenario - Approved by Demands	TRN_ADJ_DEPG_TABLE	Develop Workforce, Budget Training (GBL), Inquire, Approved in Global Scenario, Approved by Demands	View the approved demands for a global scenario.
Active Scenario Summary - Total Costs	TRN_SML_DEP_TABLE	Develop Workforce, Budget Training (GBL), Inquire, Active Scenario Summary, Total Costs	View cost details and the total cost of the active scenario.
Active Scenario Summary - Demands	TRN_SML_DEM_TABLE	Develop Workforce, Budget Training (GBL), Inquire, Active Scenario Summary, Demands	View summary information about demands that are associated with the active scenario.
Global Scenario Summary - Total Costs	TRN_SML_DEPG_TABLE	Develop Workforce, Budget Training (GBL), Inquire, Global Scenario Summary, Total Costs	View cost details and the total cost of a global scenario.
Global Scenario Summary - Demands	TRN_SML_DEMG_TABLE	Develop Workforce, Budget Training (GBL), Inquire, Global Scenario Summary, Demands	View summary information about demands that are associated with a global scenario.

You can obtain a printed report of the information in the Active Scenario Summary – Demands and Global Scenario Summary - Demands pages by running the Active Scenario Summary report.

Selecting a Scenario to Activate

Access the Choose Active Scenario page.

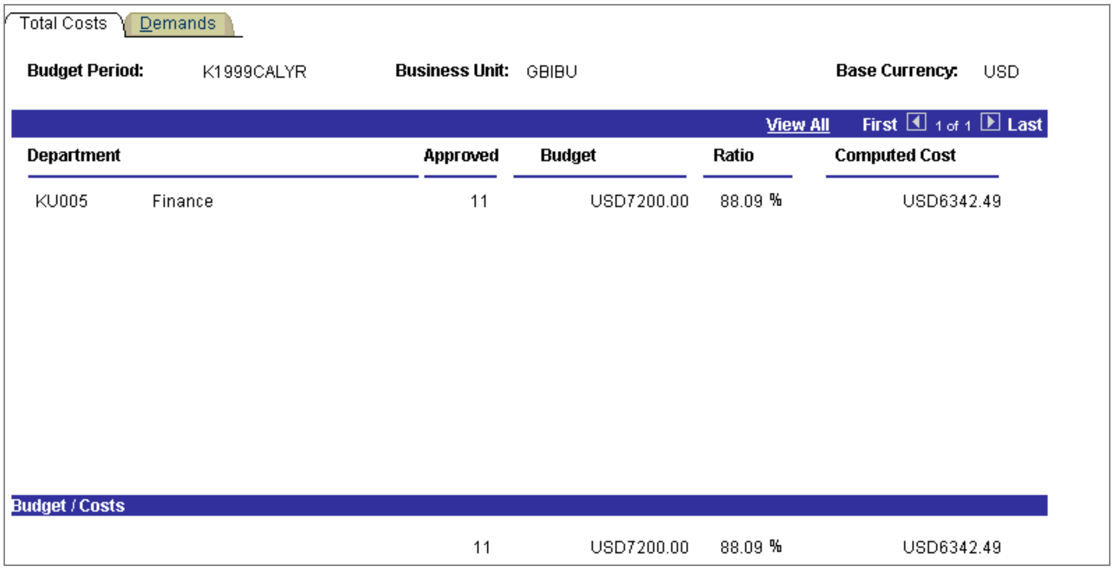


Choose Active Scenario page

Only one scenario can be active for a specified budget period and business unit, though you can work with many different budget scenarios in your Budget Training business process. You cannot change the status of a scenario that is part of a frozen budget. Press the Refresh button to view the computed amounts.

Viewing Cost Details for the Active Scenario

Access the Active Scenario Summary - Total Costs page.



Active Scenario Summary - Total Costs page

Demand ID	Displays the demand ID and its description. The symbol next to the **Demand ID** field indicates the type of demand that you are working with:
	An employee demand.
	A general (corporate) demand.

Tracking Your Training Plan

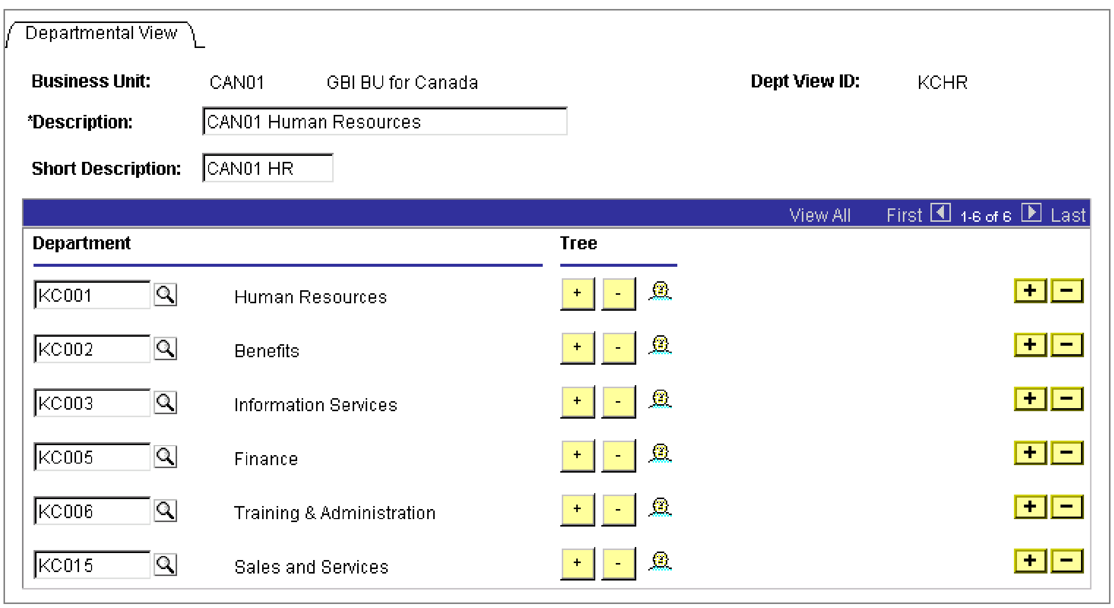
Your company training plan for a course can undergo constant cost reviews and updates until you freeze the plan. You create department views to help you view your training plan. For example, you can create a department view that corresponds to a business unit and view the aggregate training plan for all departments in that unit. These groups of departments form snapshot views, which you can use to perform comparative cost analysis.

Pages Used to Track a Training Plan

Page Name	***Object Name***	***Navigation***	***Usage***
Departmental View	TRN_DSPL_TARGET	Develop Workforce, Administer Training (GBL), Setup, Departmental View, Departmental View Develop Workforce, Budget Training (GBL), Setup, Departmental View, Departmental View	Define specific departmental groups. Use these views to display all or part of your training plan and compare actual costs to budgetary costs.
Training Plan - Course List	TRN_PLAN_APR_TABLE	Develop Workforce, Budget Training (GBL), Inquire, Training Plan, Course List	View your training plans by departmental view.

Defining Departmental Groups

Access the Departmental View page.



Departmental View page

In the **Department** field, select the departments to be included in your view. The **Tree** field provides various options and some information about the department.

See Also

"Defining Training Requirements," Using the Department Tree to Populate Departments

Freezing Budgets, Moving Unapproved Demands, and Deleting Scenarios

When you finish creating, reviewing, and adjusting your training scenarios, you can freeze your company training budget for a specified budget period and business unit.

Once you freeze a budget:

- You cannot update or change any demands or scenarios that are associated with that budget period and business unit.
- You can move unapproved demands from the frozen budget period to the next budget period.

  You can set the system to include employees whose training requests weren't approved in one budget period as part of the demand for the next budget period.

- You can delete scenarios that you no longer need.
- You can use this training plan to track budgeted costs verse actual costs.

This section describes how to:

- Freeze and unfreeze a budget period.
- Move unapproved demands to the next budget period.
- Delete obsolete global scenarios.

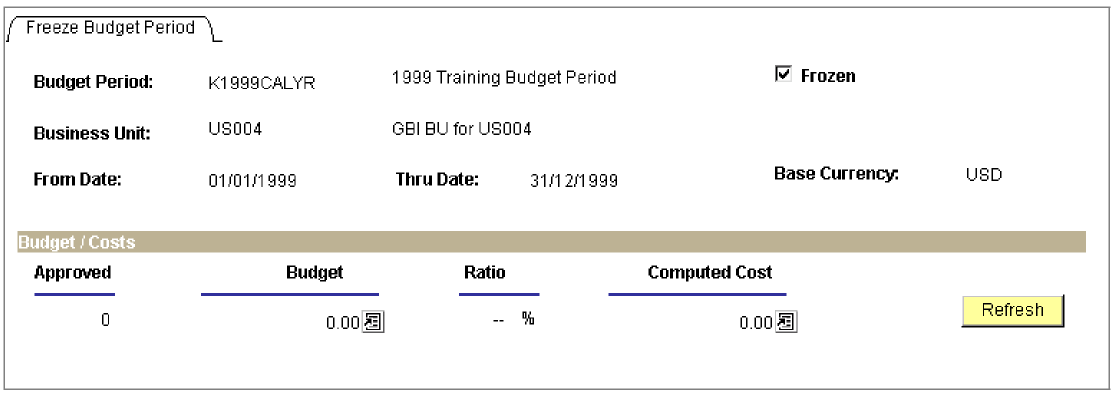
Pages Used to Freeze Budgets, Move Unapproved Demands, and Delete Scenarios

Page Name	***Object Name***	***Navigation***	***Usage***
Freeze Budget Period	TRN_FREEZE_PERIOD	Develop Workforce, Budget Training (GBL), Use, Freeze Budget Period, Freeze Budget Period	Freeze or unfreeze a budget period.
Move Non Approved Demands	RUNCTL_TRN015	Develop Workforce, Budget Training, Process, Move non Approved Demands	Move unapproved demands to the next budget period, once the current budget period has been frozen.

Page Name	*Object Name*	*Navigation*	*Usage*
Delete Inactive, Gbl Scenarios (delete inactive, global scenarios)	RUNCTL_TRN031	Develop Workforce, Budget Training (GBL), Process, Delete Inactive, Gbl Scenarios, Delete Inactive, Gbl Scenarios	Delete obsolete global scenarios. You can delete a global scenario only if the scenario's status is Inactive and the budget period for the associated business unit is frozen.

Freezing Budget Periods

Access the Freeze Budget Period page.



Freeze Budget Period page

This page displays all of the approved demands, the total budget (the sum of the department budgets included in the plan); the total computed cost for the departments in the training plan; and the budget/cost ratio for the entire training plan.

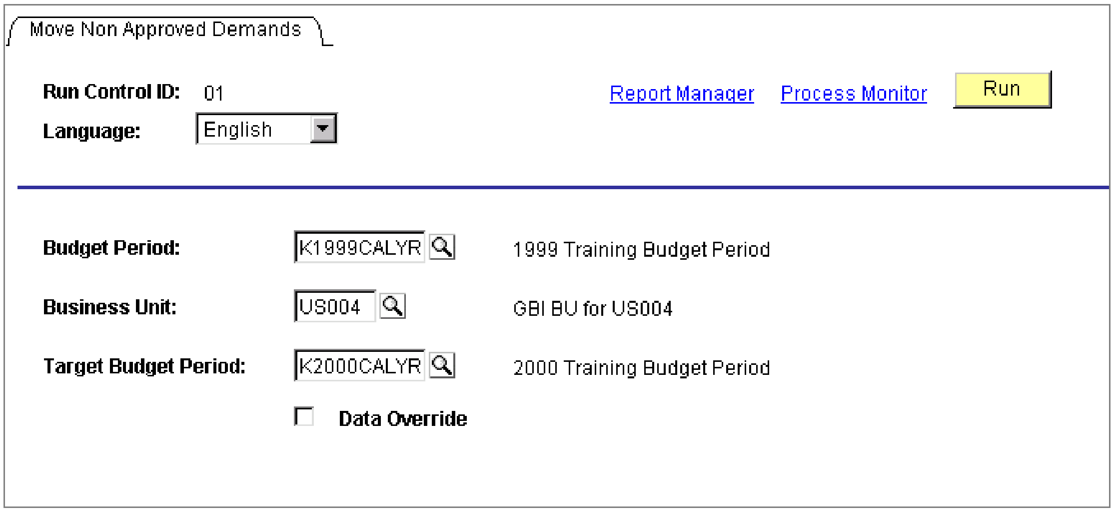
To freeze the plan, select the **Frozen** check box and save the page. This freezes the budget for the entire business unit.

Note. Freezing a training plan turns it into a *live* training budget for the specified business unit and budget period.

To unfreeze a training period, clear the **Frozen** check box and save the page.

Moving Unapproved Demands to the Next Budget Period

Access the Move Non Approved Demands page.



Move Non Approved Demands page

A 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,* and you approved only 12, the system considers the unapproved demands for the demand ID to be *4,* because you didn't approve 4 of the requested headcount. The Move Non Approved Demands process carries forward the 4 unapproved demands for the demand ID.

Budget Period and **Business Unit**
Select the budget period and business unit to move the unapproved demands from.

Target Budget Period
Select the budget period to move the demands to.

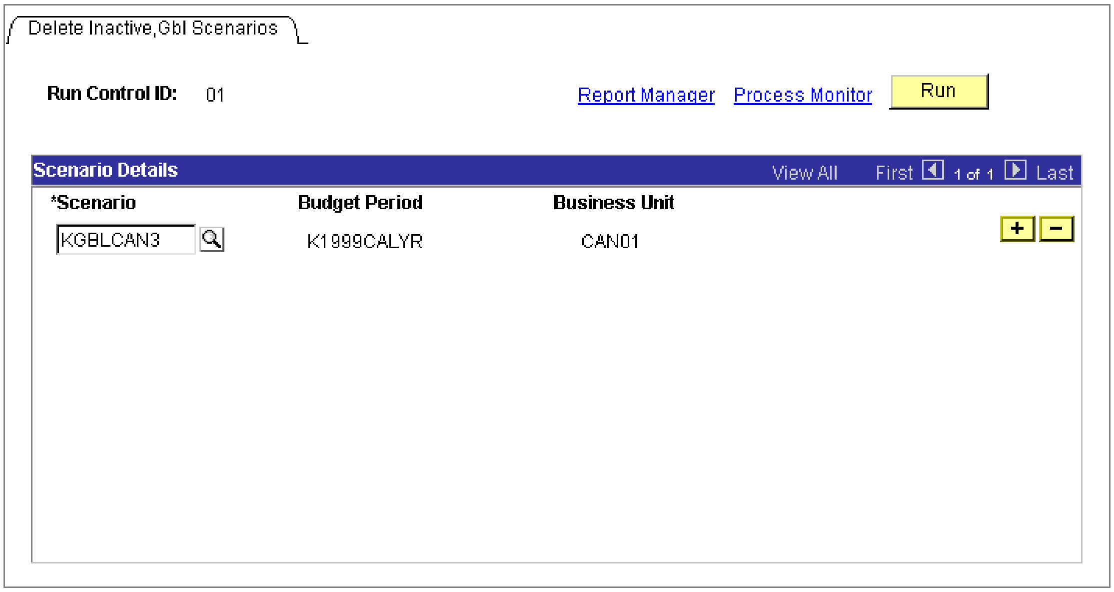
Note. We recommend that you apply this process to unapproved budgets before creating any new demands for the target budget period.

Data Override
Select if you have already run the Move Non Approved Demands process and you want to override the results from the previous run with the new results.

Important! If you clear this check box, and you're running the process for the first time, the system will not override any manual changes that you've made to the process results. If you rerun the process later, with this 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. If the check box is clear, you'll lose any changes.

Deleting Obsolete Scenarios

Access the Delete Inactive, Gbl Scenarios page.



Delete Inactive, Gbl Scenarios page

When you run this process, the system deletes data from these tables: TRN_SIMULATION and TRN_SCENARIO.

Scenario Details

Scenario Select the scenario 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 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.

See Also

PeopleTools PeopleBook: Process Scheduler

C H A P T E R 7

Administering Course Sessions

This chapter provides an overview of course sessions and tells you how to:

- Plan and set up course sessions.
- Set up course session costs.
- Close completed or canceled sessions.
- Record student feedback.

Understanding Sessions

Course sessions can be divided into cut sessions. 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, such as a course that runs two days a week for a month.
- Are held in various training rooms or facilities.
- Have multiple instructors.

See Also

"Defining Training Courses and Programs"

Common Elements Used in This Chapter

Business Unit	Select the unit to which a 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.
TrngReq# (training request number)	The system displays this number on some course evaluation pages.

(FRA) France

Financing Department	Select the department that receives funds.
Financed Cost	Enter if some or all of the cost is being financed by an external fund.
Financing Fund	Select the fund that is financing the cost. Define funds in the Vendor Table.

Planning and Setting Up Course Sessions

This section describes how to:

- Plan new course sessions.
- View details of room bookings.
- View instructors' schedules.
- Set up general information about course sessions.
- Set up course session locations and instructors.
- View and update session address and contact details.
- Select training rooms.
- Choose instructors.
- Specify required equipment and materials.
- View a list of available equipment and materials.
- Define miscellaneous expenses.
- View details of course sessions.

Pages Used to Plan and Set Up Course Sessions

Page Name	*Object Name*	*Navigation*	*Usage*
Course Session Planner	CRS_SESS_PLAN1	Develop Workforce, Administer Training (GBL), Setup, Course Session Planner, Course Session Planner	Plan new course sessions. Check availability of training rooms and instructors.

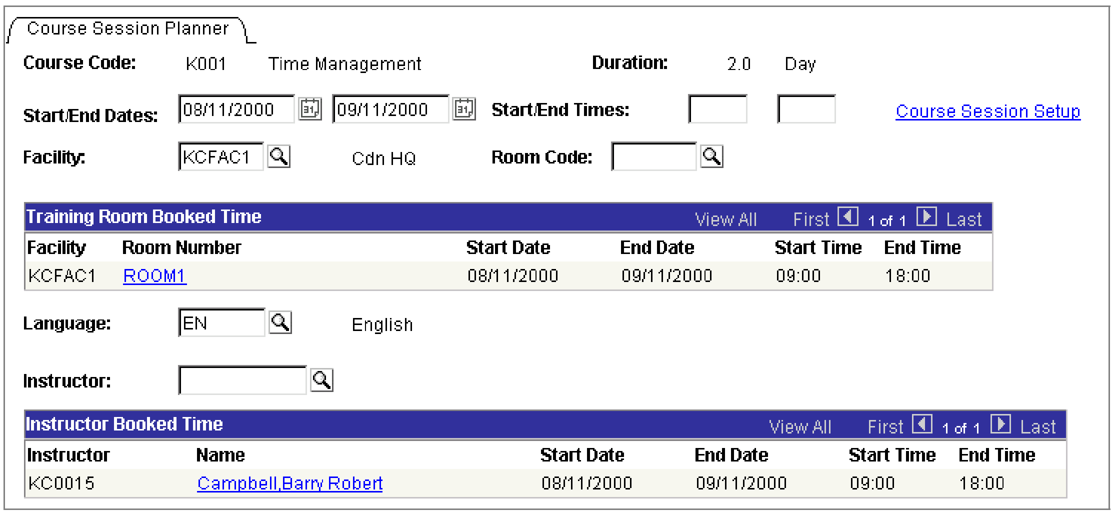
Page Name	***Object Name***	***Navigation***	***Usage***
Crse Session Planner Facility (course session planner facility)	TRN_PLAN_FAC_SEC	Develop Workforce, Administer Training (GBL), Setup, Course Session Planner, Course Session Planner Click the room number.	View room booking details. All displayed data comes from the Course Session Table.
Course Session Planner Instr. (course session planner instructor)	TRN_PLAN_INSTR_SEC	Develop Workforce, Administer Training (GBL), Setup, Course Session Planner, Course Session Planner Click the instructor name.	View instructors' schedules.
Course Session Table - Course Session Profile	COURSE_SESSN_TBL1	Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Course Session Profile	Set up general information about the course session, including start and end dates, session length, number of students who can enroll in the session, and session language (if the course is multilingual).
Course Session Table - Location, Instructor	COURSE_SESSN_TBL2A	Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Location, Instructor	Set up the location of the course session and the course instructor. If you are dividing the course session into cut sessions, set up the start and end dates, location, and instructor for each cut session. Before using this page, set up the training facilities on the Training Facility Table. If you use external companies to manage course sessions, add them to the Vendor Table and add instructors to the Instructor Table.

Page Name	***Object Name***	***Navigation***	***Usage***
Training Facility Address	TRN_FACIL_ADDR_SEC	Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Location, Instructor Click Training Facility Address.	View and update the address and contact details of the course session or cut session.
Select Free Training Room	TRN_ROOM_SEL_SEC	Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Location, Instructor Click Select free Training Room.	Select a training room for the course session or cut session.
Select Free Instructor	TRN_INSTR_SEL_SEC	Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Location, Instructor Click Select free Instructor.	Select an instructor for the course session or cut session.
Course Session Table - Equipment	COURSE_SESSN_TBL3A	Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Equipment	Specify the equipment and materials that are required for the course session. Set up your equipment codes on the Equipment and Materials Table page.
Training Facility Equipment	TRN_FAC_EQUIP_SEC	Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Equipment Click Training Facility Equipment. Equ Equip	View a list of the equipment and materials available at the training facility.
Course Session Table - Expense	COURSE_SESSN_TBL4A	Develop Workforce, Administer Training (GBL), Setup, Course Session Table, Expense	Define the miscellaneous expenses that are associated with a course session. Set up the Tuition Expense Type Table page before using this page.

Page Name	Object Name	Navigation	Usage
Course Session Summary	TRN_CRS_STUDNT_SUM	Develop Workforce, Administer Training (GBL), Inquire, Course Session Summary, Course Session Summary	View details of a course session, including the start and end dates, session location, and list of students.

Planning New Course Sessions

Access the Course Session Planner page.



Course Session Planner page

Start/End Dates

Enter these dates. When you leave 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 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. The system doesn't check instructor or facility availability until you select a start date. Before setting up the course session, you must complete both dates, because they become the course session start and end dates when you click **Course Session Setup**.

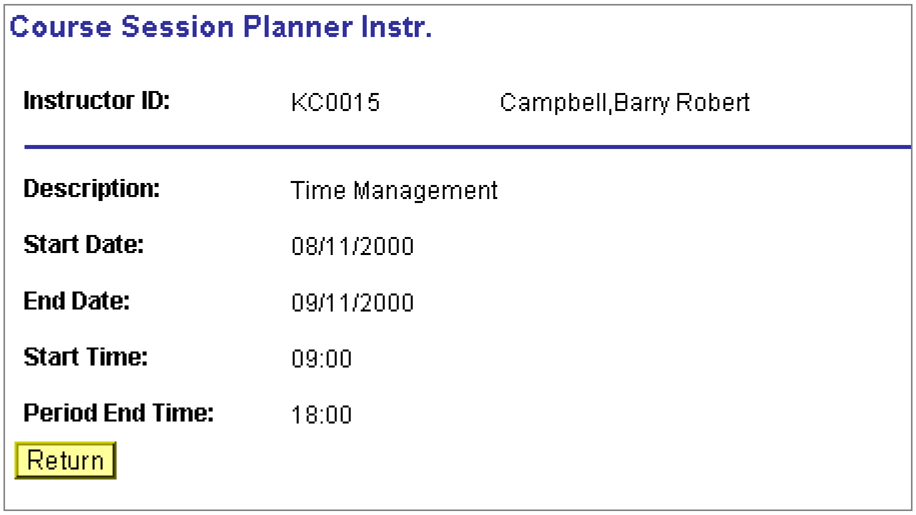
Start/End Times

The system displays these fields when you complete the end date and leave the **Start/End Dates** fields. Enter the start and end times for the course session.

Course Session Setup	Click this link to set up the course session. The **Instructor** and **Facility** fields aren't mandatory, so you can set up a course session with just one of them completed. If you don't select an end date or if the instructor or training room that you selected is booked, this field is unavailable for entry. When you click **Course Session Setup,** the system transfers you to the Course Session Table and copies the data from the Course Session Planner page. Complete the Course Session Table pages. When you save the pages, the system returns to the Course Session Planner page.
Facility	Select a facility from the list. When you move out of the field, the system checks the Course Session Table for existing bookings and displays in the **Training Room Booked Time** group box the dates and times when training rooms at the facility are booked during the specified period. Click the **Room Number** link in that group box to check the Crse Session Planner Facility page for booking details. If the **Training Room Booked Time** group box is blank, the facility is free during the specified period.
Room Code	The system makes this field available for entry when you complete the **Facility** field. Select a room code from the list. When you leave the field, the system checks existing room bookings and updates the **Training Room Booked Time** group box to show the bookings for the selected room. If this group box is blank, there are no bookings for that room.
Language	Select a language from the list of values. If the course isn't multilingual, this field is unavailable for entry. You designate courses as multilingual on the Course Table - Course Profile page.
Instructor	Select an instructor from the list. When you leave the field, the system checks the instructor's availability and lists in the **Instructor Booked Time** group box the dates and times that the instructor is unavailable during the specified period. Click the instructor's name in that group box to view the Course Session Planner Instr. page, where you can view the reason that the instructor is unavailable. The system also checks the instructor's training schedule and absence history. If the **Instructor Booked Time** group box is blank, the instructor is available for the specified period.

Viewing Instructors' Schedules for a Selected Period

Access the Course Session Planner Instr. 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

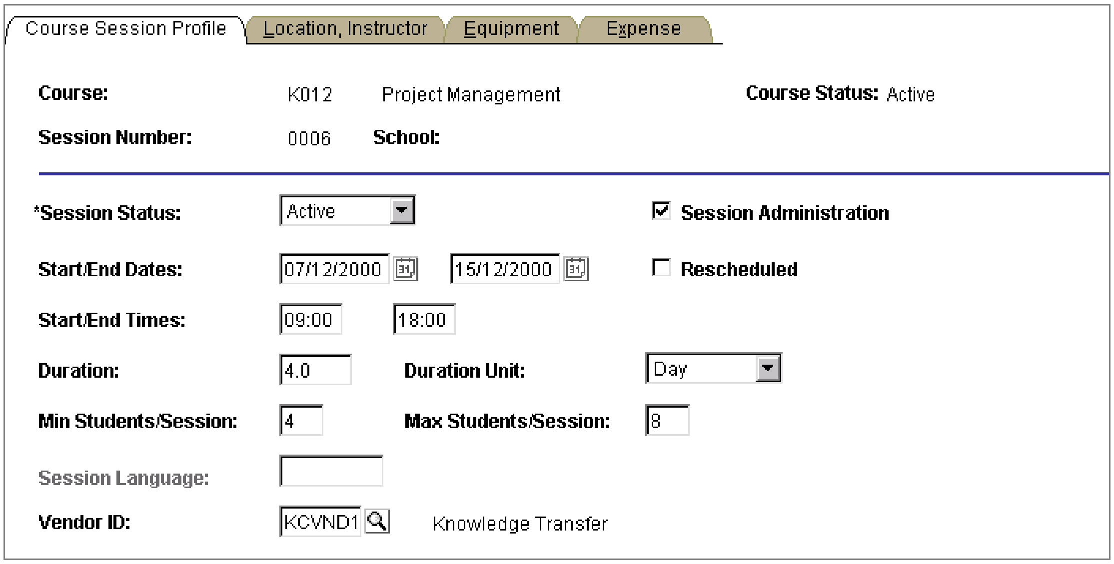
Course Session Planner Instr. page

The data on this page comes from the instructor's absence history if the instructor has a planned absence, or from the Course Session Table if the instructor is scheduled to teach.

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, from that person's absence history.

Setting Up General Information About Course Sessions

Access the Course Session Table - Course Session Profile page.



Course Session Table - Course Session Profile page

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.

Session Number

If you add a new session and leave this blank, a sequential session number is generated.

You can reuse session numbers from completed or canceled sessions.

Session Status

Select a status:

Active: Select this default status when you create a new course session. You can enroll students only in ***Active*** sessions.

Canceled: Select if the session has been canceled.

Complete: Select if the course session has been completed. This updates data for each enrollee.

Start/End Dates and **Start/End Times**

Enter these dates and times. When you change the start or end date of a course session, the system updates the dates in the student training records for students who are on waiting lists or enrolled in course sessions.

Rescheduled

Select if you change session information, such as dates or times, so that you know that you’ve made changes to the original information. Select this check box if you need to generate training letters notifying students of session changes.

When you select this check box and save the page, the system changes the letter code in the student training record to *RSC* (reschedule). You can create a form letter to notify students of rescheduled sessions.

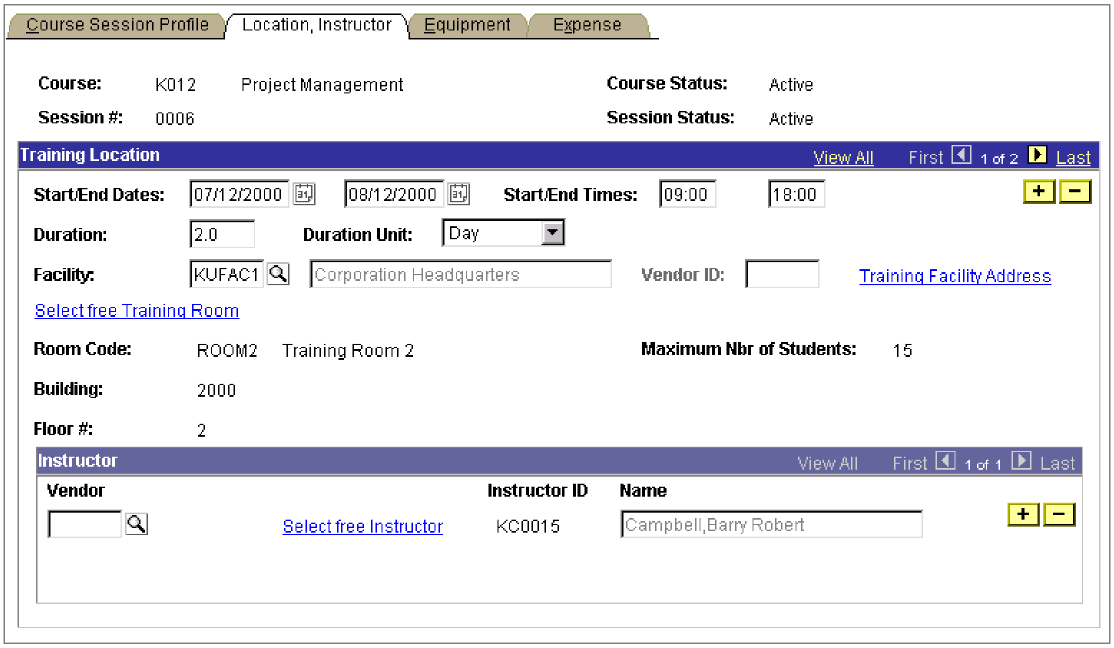
Session Administration	This check box is selected by default to indicate the use of PeopleSoft Human Resources to administer the course session. Clear the check box if you don't want PeopleSoft Human Resources to administer the session.
Duration	Displays the default from the Course Table. You can change it.
Duration Unit	Displays the default from the Course Table. You can select a different unit from the list.
Min Students/ Session (minimum students per session) and **Max Students/Session** (maximum students per session)	The system gets these numbers from the Course Table. You can update them. If you're enrolling students in this session using the Course Auto Enrollment page, enter a number in the **Max Students/Session** field—otherwise the system can't enroll any students in the course. If you select a training facility code on the Course Session Table - Location, Instructor page, the system validates the number that you enter in the **Max Students/Session** field against the room's maximum capacity.
Session Language	Select a language from the list. This field is 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 a session to a vendor. Vendor IDs are stored in the Vendor Table.

See Also

Closing Completed or Canceled Sessions

Setting Up Course Session Locations and Instructors

Access the Course Session Table - Location, Instructor page.



Course Session Table - Location, Instructor page

Training Location

This group box contains details about all course session locations. You can select a training facility from the Training Facility Table or specify a vendor if the course is at an external site.

Start/End Dates and **Start/End Times**	The system displays the course session dates and times. If the course session is divided into cut sessions, insert a row for each session, adjust the dates for each row, and adjust the times, if they vary.
Duration	The system displays the default from the Course Session Table - Course Session Profile page. If the course session is divided into cut sessions, adjust for each cut session. Make sure that the duration of all the cut sessions equals that of the course session.
Duration Unit	The system displays the default from the Course Session Table - Course Session Profile page. Select a different unit if a cut session is measured differently.
Facility	If the session is at a facility that you set up in the Training Facility Table, select the appropriate facility. When you leave this field, the system completes the facility name fields; you can’t change them. If the training facility isn’t set up in the Training Facility Table, leave this field blank and add the address to the Training Facility Address page.
Vendor ID	If a vendor is managing the course session, select a vendor ID from the list. When you leave this field, the system enters the vendor name.

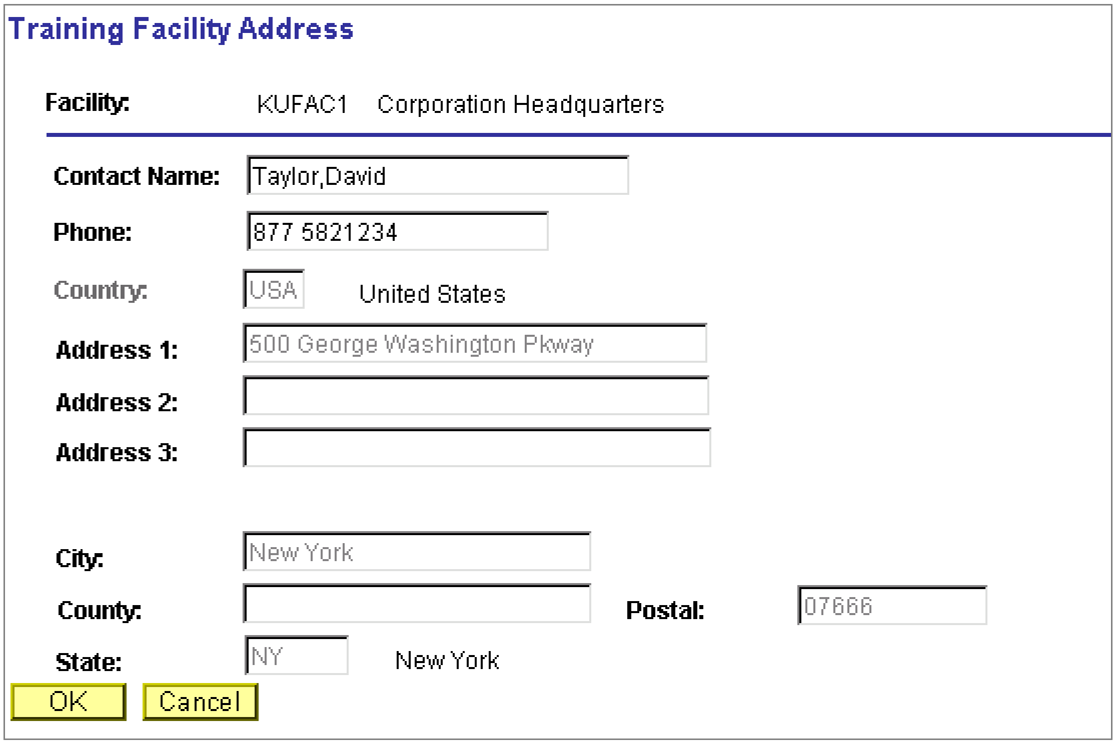
Select free Training Room	Click this link to display the Select Free Training Room page. The system checks the training room bookings and displays a list of the rooms that are available during the specified period. If the **Facility** field is blank, this link is unavailable.
Room Code	The system displays the room code and room name when you select a training room on the Select Free Training Room page. This field is unavailable for entry. To change the code, click Select free Training Room again.
Building	When you select a training room for the session, the system displays the room's building. 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 room's floor number. This field isn't available for entry. Floor # is an optional field on the Training Facility Table - Training Rooms page.
Training Facility Address	Click this link to display the Training Facility Address page, which displays the address of the selected facility or vendor. If the **Facility** and **Vendor ID** fields are blank, the Training Facility Address page is blank.
Maximum Nbr of Students (maximum number of students)	When you select a training room, the system displays how many students it accommodates. This field isn't available for entry. Set up training rooms on the Training Facility Table - Training Rooms page.

Instructor

Vendor	If the instructor is from a vendor, select the vendor ID from the list. When you leave this field, the system displays the vendor name alongside Vendor. If a vendor doesn't employ the instructor, leave Vendor blank.
Select free Instructor	Click this link to display the Select Free Instructor page. The system checks the instructors' profiles and teaching schedules and displays a list of qualified instructors who are available during the specified period.
Instructor ID	When you select an instructor on the Select Free Instructor page, the system displays this. This field isn't available for entry. To change instructors, click **Select free Instructor.**
Name	When you select an instructor on 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 don't select an instructor ID from the Select Free Instructor page. To change instructors, click **Select free Instructor.**

Viewing and Updating Session Address and Contact Details

Access the Training Facility Address page.



Training Facility Address page

The system completes fields on this page from the Training Facility Table or the Vendor Table, depending on your selections on the Course Session Table - Location, Instructor page:

- If you selected a training facility code, the system takes the contact and address from the Training Facility Table.
- If you selected a vendor, the system takes the vendor address from the Vendor Table (Contact Name and Phone are blank).
- If Training Facility and Vendor are blank, the system leaves all the fields on the page blank.

Contact Name	Enter the name of a contact at the training facility. If you selected a facility on the Course Session Table - Location, Instructor page, the system displays the contact name from the Training Facility Table - Contacts and Equipment page. You can update the name.
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. You can update the number.

Country

If you selected a training facility or a vendor on the Course Session Table - Location, Instructor page, the system completes the Country and address fields, making them unavailable for entry.

If the Country field is blank, select from the list of valid values. When you leave the field, the system dynamically generates that country's proper address format, as specified on the Country Table, Address Format page.

Choosing Training Rooms

Access the Select Free Training Room page.

Select Free Training Room page

Training Room Availability

This group box contains a list of the rooms at the facility that are suitable for the course session or cut session. The system displays the rooms that meet these criteria:

- The room is available during the period that you specified on the Course Session Table - Location, Instructor page.
- The room can accommodate the maximum number of students that you specified on the Course Session Table - Course Session Profile page.

Room Code

Select the check box for the training room to book for the course session or cut session.

Room Nbr (room number)

System-displayed. You set up training rooms in the Training Facility Table.

Choosing Instructors

Access the Select Free Instructor page.

Select Free Instructor page

Instructor Availability

This group box contains a list of the instructors who are suitable for the course session or cut session. The system includes only instructors who are:

- Qualified to teach the course.

  You use the Instructor Table – Qualification page to define the courses that an instructor can teach. If the course is multilingual, the system checks the instructor's language skills. Only instructors who can teach in the language you specified on the Course Session Table - Course Session Profile page are on the list. Record employee and nonemployee language abilities on the Languages page.

- Available during the period that you specified on the Course Session Table - Location, Instructor page.

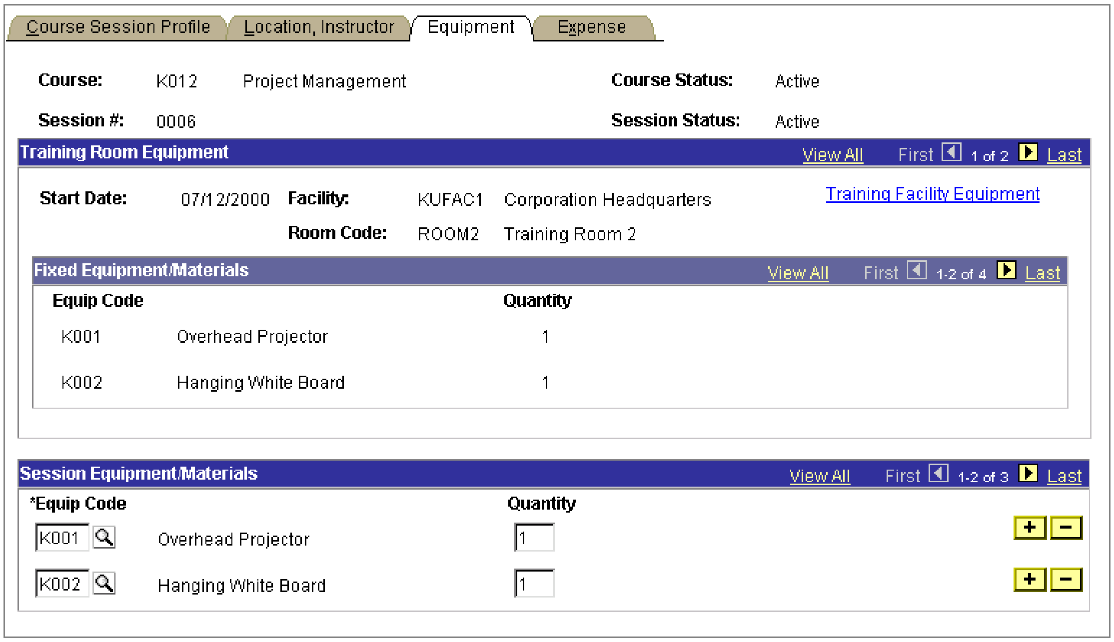
  The system checks the instructor's teaching schedule and absence data. This prevents you from scheduling instructors during planned absence periods such as vacations.

Instructor — Select the check box next to the instructor to be booked for the course session or cut session.

Name — System-displayed. You set up instructors on the Instructor Table - Instructor Profile page.

Specifying Required Equipment and Materials

Access the Course Session Table - Equipment page.



Course Session Table - Equipment page

Training Room Equipment

This group box displays details of the training facility that you selected on the Course Session Table page. If you divided the course session into cut sessions, check the details of the training facility for each cut session.

Training Facility Equipment	Click this link to display a list of shared equipment that is available at the training facility. If you haven't specified a facility, this link is unavailable.

Fixed Equipment/Materials

If you selected a training facility code on the Course Session Table - Location, Instructor page, the system displays a list of the fixed equipment available in the selected training room. Facility equipment is defined on the Training Facility Table - Training Rooms page.

Session Equipment/Materials

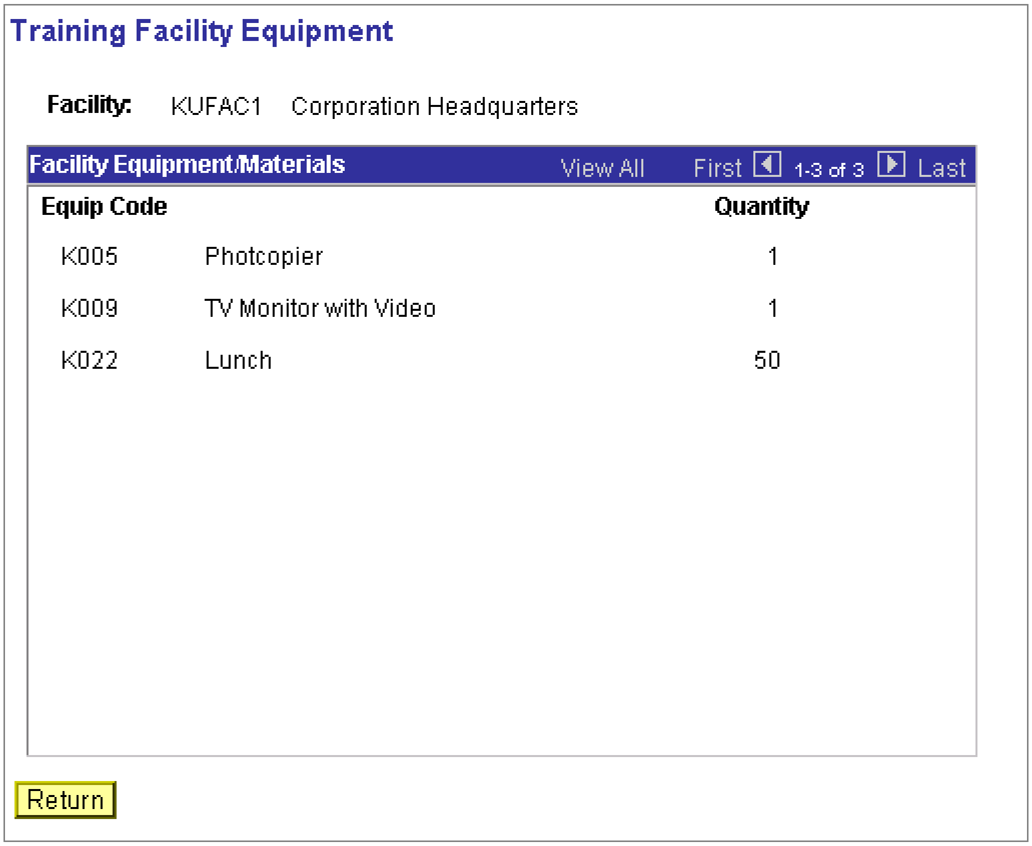
Use this group box to specify the equipment and materials required for the course session. The system gets this from the Course Cost - Vendor, Facility, and Equipment page. You can update the equipment list.

Equip Code (equipment code)	Select from the list of valid values. Set up equipment/material codes on the Equipment and Materials Tabl page. If you selected a training facility on the Course Session Table - Location, Instructor page, you don't need to include in your list the fixed equipment shown in the Fixed Equipment/Materials group box.

Note. To find out whether the equipment required for the course session is available at the training facility, generate the Equipment Checklist report.

Viewing a List of Available Equipment and Materials

Access the Training Facility Equipment page.



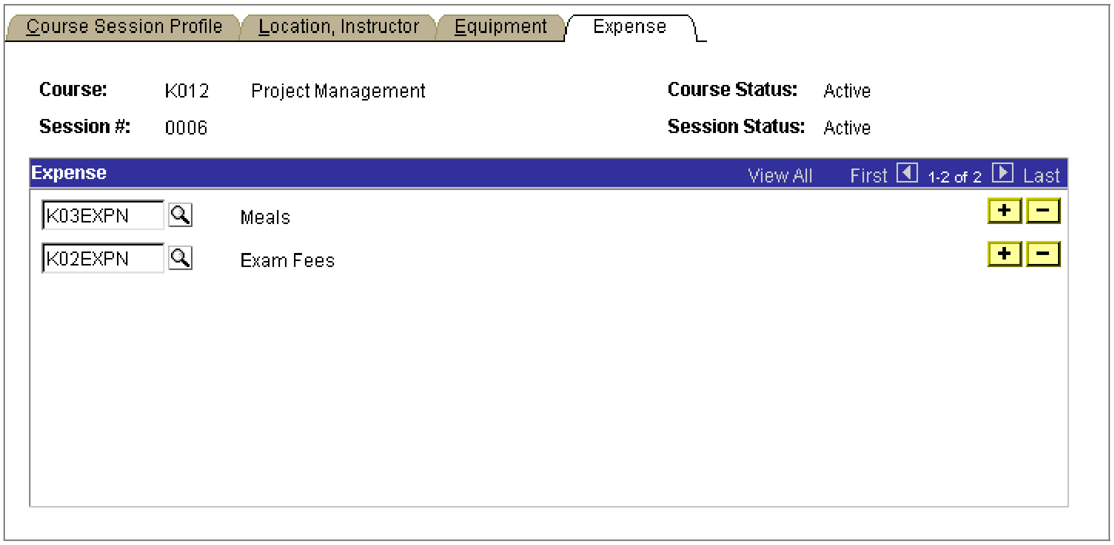
Training Facility Equipment page

Facility Equipment/Materials

This group box lists the equipment that is available at the training facility. It includes only equipment that is shared among training rooms, not the fixed equipment associated with individual training rooms. Define training facility equipment on the Training Facility Table - Contacts and Equipment page.

Defining Miscellaneous Expenses Associated With a Course Session

Access the Course Session Table - Expense page.



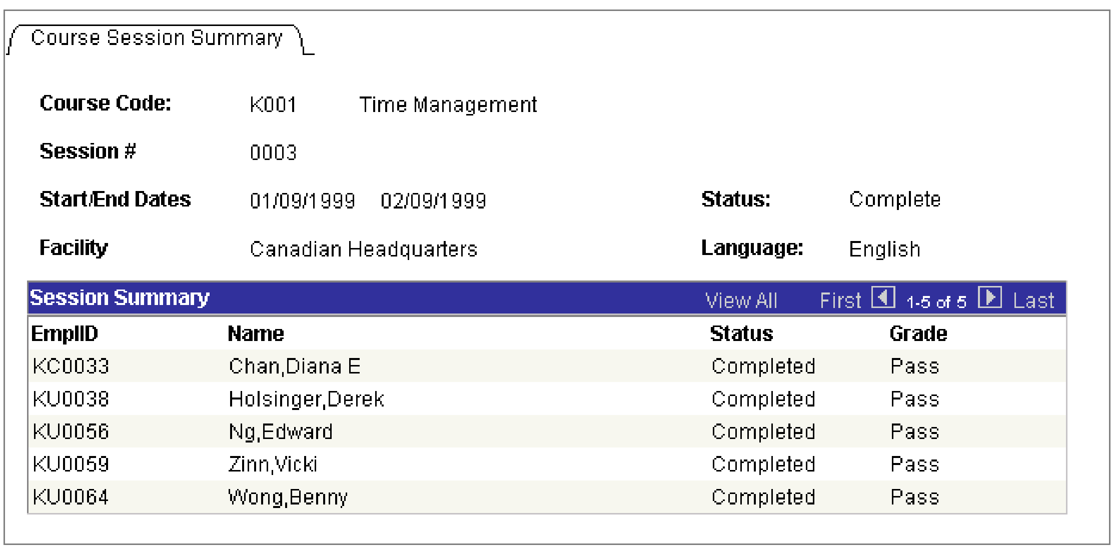
Course Session Table - Expense page

Expense

Use this group box to create a list of the types of expenses that are associated with this course session. The system populates the fields from the Course Cost - Instructor, Expense page. Update the expense list as required.

Viewing Course Session Details

Access the Course Session Summary page.



Course Session Summary page

If the course session hasn't completed, the system shows who is enrolled or waitlisted for the session. If the course session has completed, the system shows which students completed the course and what their grades were.

All data that the system displays on the Course Session Summary page comes from the Course Session Table.

Session Summary

This group box lists the students associated with the course session.

Status	The system displays the session status: ***Active:*** The default status when you add a new session. ***Canceled:*** The session has been canceled. ***Complete:*** The course session has completed.
Grade	If a student has successfully completed the course, the system displays the student's grade. Enter grades on the Student Training - Course Student Enrollment page.

Setting Up Course Session Costs

Tracking the costs that are associated with each session enables you to account for the fact that different sessions of the same course cost your organization different amounts of money, if a course is taught in multiple geographical areas or facilities, for example.

The course session costs come from the Course Cost Table. If you already defined general course costs in the Course Cost Table, you can modify them at the session level.

In this section, we discuss how to:

- Enter vendor costs for a course session.
- Set up session costs that are associated with the facility and instructor.
- Record costs associated with required equipment.
- Record costs associated with the course session expenses.

Note. You need to establish costs for training facilities only if you are working with Training Budgets.

Note. The annuity factor must be set before entering any costs in the system.

See also

Overview of Cost Units and Cost Types

Pages Used to Set Up Course Session Costs

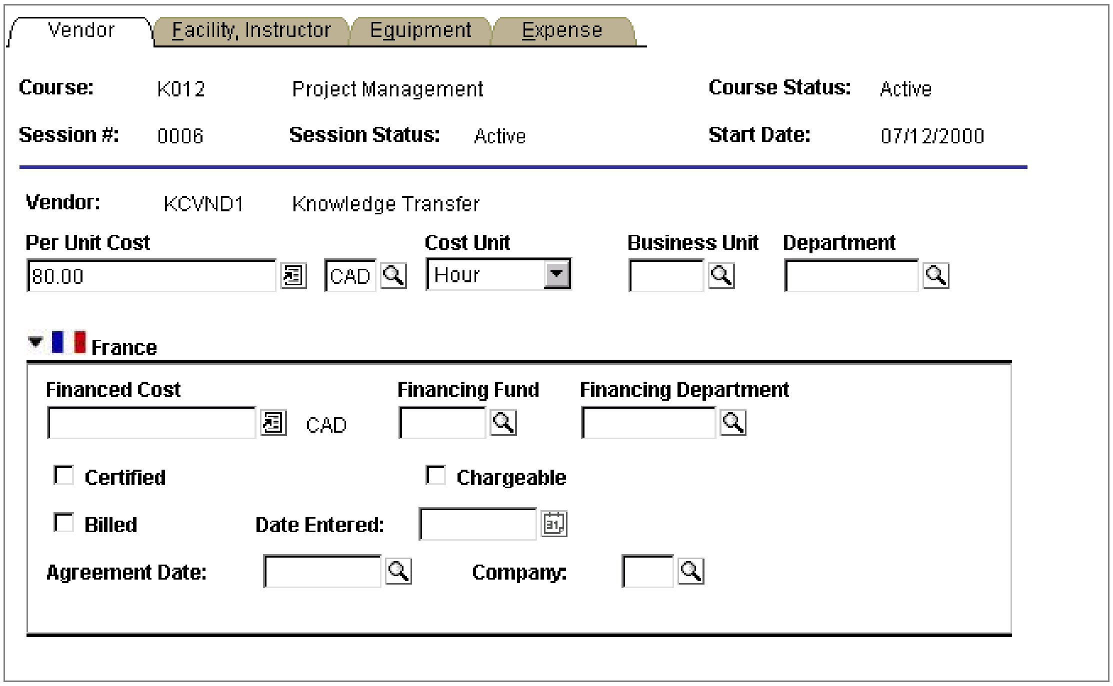
Page Name	***Object Name***	***Navigation***	***Usage***
Course Session Cost - Vendor	CRS_SESSN_TBL5_GBL	Develop Workforce, Administer Training (GBL), Setup, Course Session Cost, Vendor	Enter vendor costs for a course session. Vendor costs are set up in the Course Session Table.
Course Session Cost - Facility, Instructor	CRS_SESS_TBL6A_GBL	Develop Workforce, Administer Training (GBL), Setup, Course Session Cost, Instructor	Set up session costs that are associated with the facility and instructor. If you divided the course session into cut sessions, enter costs for each cut session.
Course Session Cost - Equipment	CRS_SESS_TBL7A_GBL	Develop Workforce, Administer Training (GBL), Setup, Course Session Cost, Equipment	Record costs that are associated with the equipment required for the course session.
Course Session Cost - Expense	CRS_SESSN_TBL8_GBL	Develop Workforce, Administer Training (GBL), Setup, Course Session Cost, Expense	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.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Setting Up PeopleSoft HRMS”

Entering Vendor Costs for a Course Session

Access the Course Session Cost - Vendor page.



Course Session Cost - Vendor page

If the vendor manages all training requirements—such as facilities, equipment, and instructors—for a single cost, you need only enter that amount here, without providing information on the other pages in this component.

Per Unit Cost	Enter for the vendor that is associated with this course session, and select a currency from the list of valid values if it is not the default currency. If you didn't specify a vendor for this course session, this field isn't available for entry. 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 established on the Training Base Currency Table (TRN_BASE_CURRENCY).
Cost Unit	Select the unit that is associated with the amount in the **Per Unit Cost** field; for example: ***Hour:*** To track hourly charges. ***Day:*** If the vendor bills by the day.

Note. If you don't enter business unit and department information on this page, the system looks at the employee's record for this course session on the Course Session Enrollment page (COURSE_ENROLLMENT) when it processes the compute student cost processing.

(FRA) France

For French companies only, you define additional course session cost financing information for the 2483 report requirements.

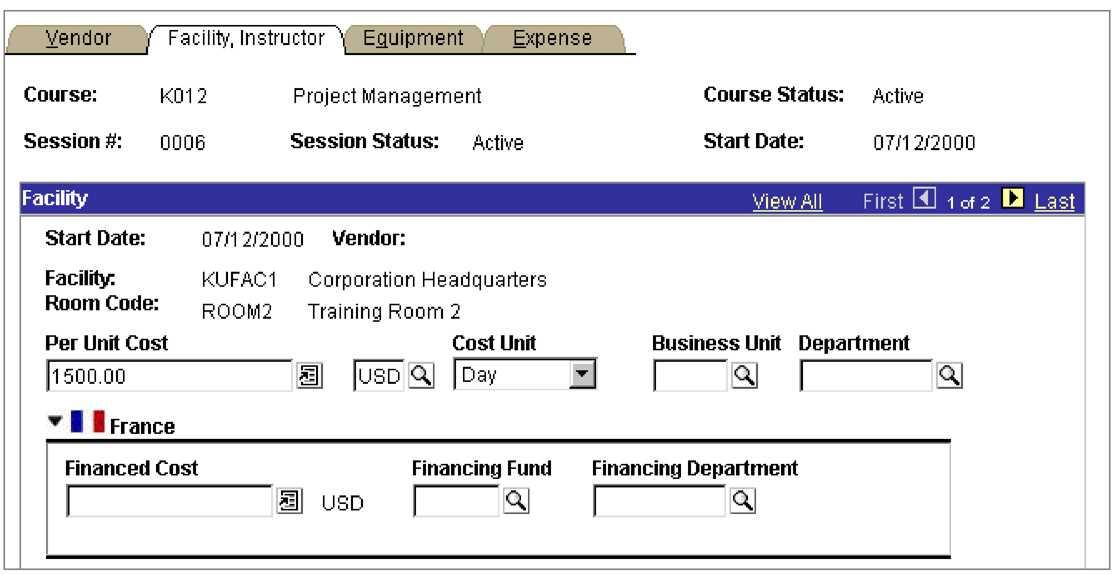
Certified	Select if the vendor administering the course session is government certified.
Chargeable	Select if the vendor costs are chargeable to the company.
Billed	Select if the vendor cost is to be included in your 2483 report. Clear the check box to track the cost but not have it included in the 2483 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.

See Also

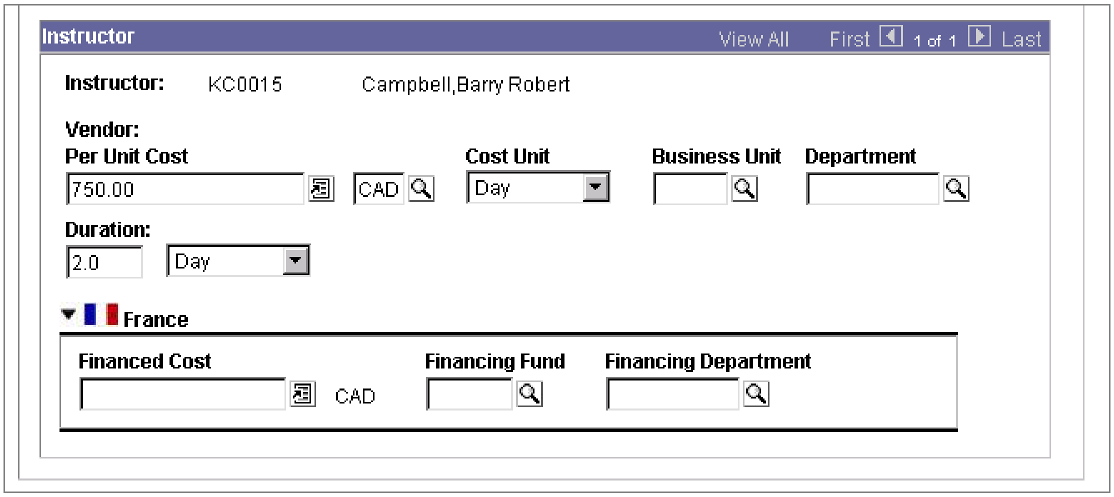
"Producing the French Training Report 2483"

Setting Up Session Costs That Are Associated With the Facility and Instructor

Access the Course Session Cost - Facility, Instructor page.



Course Session Cost - Facility, Instructor page (1 of 2)



Course Session Cost - Facility, Instructor page (2 of 2)

Facility

This data comes from the Course Session Table. If you didn't specify a training facility, the fields are unavailable for entry. If you divided the course session into cut sessions, enter facility costs for each cut session.

Vendor If the course session or cut session is at a vendor site, this field is unavailable for entry.

Per Unit Cost Enter for the facility where the course session or cut session is held. You can update the cost currency.

Specify the default currency for business units for a budget period on the Budget Period Table. Budgets for your organization are automatically converted to your default base currency that you establish on the Training Base Currency Table (TRN_BASE_CURRENCY).

Cost Unit Select from the available options. This is the unit in which the facility's per unit cost amount is measured. For example, if you're tracking hourly charges, select ***Hour.***

Note. If you don't enter business unit and department information here, 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.

Instructor

Instructor data comes from the Course Session Table – Location, Instructor page. Instructor costs come from the Instructor Table - Instructor Profile page. If instructors aren't specified, the fields are unavailable for entry.

If you divided the course session into cut sessions, enter instructor costs for each cut session.

Instructor — Displays information from the Course Session Table.

Vendor — If the instructor works for a vendor, the system displays the vendor ID and the field is unavailable for entry. If the instructor isn't from a vendor, the field is blank.

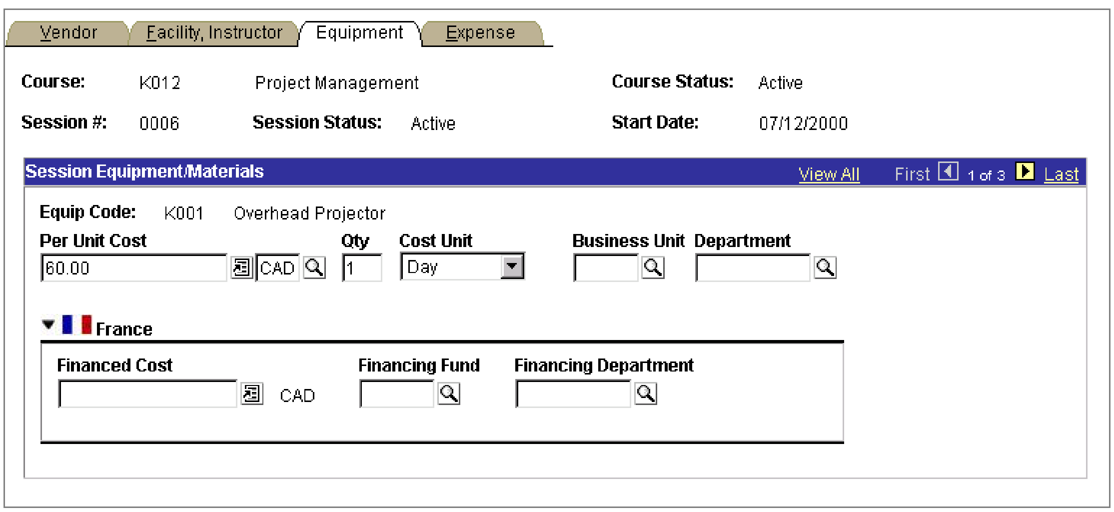
Per Unit Cost — Enter the cost for the instructor who is associated with this course session or cut session. In the field next to this field, the default currency appears. You can select a different currency.

Cost Unit — Select a cost unit from the list. This is the unit in which the instructor's per-unit cost amount is measured. For example, if the instructor is paid a daily rate, select ***Daily.***

Duration — This value comes from the Course Session Table. Update this field only if 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, update this field to ***3*** days. Updating this field doesn't change the data in the Course Session Table.

Recording Costs That Are Associated With Required Equipment

Access the Course Session Cost - Equipment page.



Course Session Cost - Equipment page

Session Equipment/Materials

The system gets equipment and materials data from the Course Session Table. You can't enter new equipment or materials for course sessions on this page. To update or modify that information, use the Specifying Required Equipment and Materials.

If you didn't specify any equipment or materials for this course session, the fields are unavailable for entry.

Per Unit Cost — Enter an amount for the item specified by Equip Code. Select a cost currency if you don't want to use the default currency for this cost.

Specify the default currency for business units for a budget period on the Budget Period Table. Budgets for your organization are automatically converted to your default base currency that you establish on the Training Base Currency Table (TRN_BASE_CURRENCY).

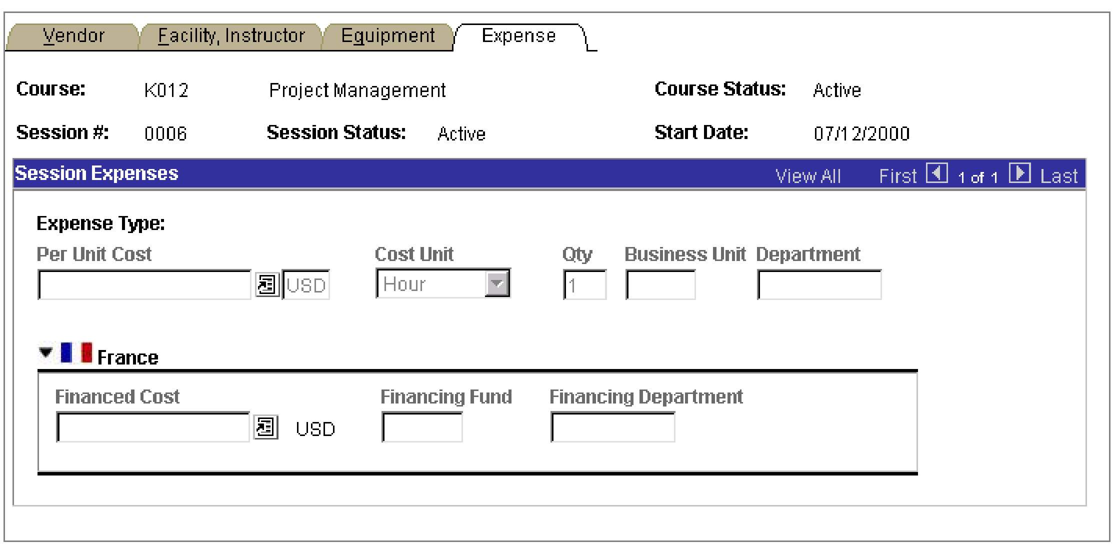
Qty (quantity) — The system gets the equipment quantity from the Course Session Table. To change this value, enter the new quantity. When you save the changes, the system updates the data in the Course Session Table.

Cost Unit — Select the unit in which the equipment per-unit cost is measured.

Note. If you don't enter business unit and department information here, 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.

Recording Costs That Are Associated With Course Session Expenses

Access the Course Session Cost - Expense page.



Course Session Cost - Expense page

Session Expenses

Before entering cost information for course session expenses, associate the expenses with a course session on the Course Session Table - Expense page. If you didn't specify any expenses for this Course Session, the Per Unit Cost and currency fields are unavailable for entry.

Per Unit Cost	Enter a per unit cost for each expense type that is associated with this course session. The default currency is displayed; you can select a different currency. Specify the default currency for business units for a budget period on the Budget Period Table. Budgets for your organization are automatically converted to your default base currency that you establish on the Training Base Currency Table (TRN_BASE_CURRENCY).
Cost Unit	Select the unit in which the per-unit cost amount is measured. For example, if you're tracking hourly charges for parking, select ***Hour;*** if you reimburse a flat rate for parking, choose ***Flat Cost.***
Business Unit	If you're entering information for more than one expense, you can specify that each one be billed to a different business unit and department.

Note. If you don't enter business unit and department information here, 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.

Closing Completed or Canceled Sessions

Once a course session has taken place—or when you cancel a session—you need to indicate that the session is closed.

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 it.

   - If you set the session status to *Complete,* a message appears when you save your changes, and the system updates:

   - Student training profiles.

The profiles show that the students enrolled in this session have completed this course.

- Student competency profiles.

The system assigns the competencies and accomplishments that are defined on the Course Table - Prereqs, Goals page.

- If you set the session status to *Cancel* the system updates the student data automatically and inserts the letter code of CAIN (cancellation) so that you can generate letters notifying students of the session cancellation. You create letter codes on the Standard Letter Table page.

Once you've set **Session Status** to *Complete* or *Canceled,* you can no longer use the course session during enrollment and rescheduling.

3. If any students are on a waiting list for a canceled or completed 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.

See Also

Generating Administer Training Letters

Planning and Setting Up Course Sessions

Recording Student Feedback

This section describes how to:

- Record student feedback on course sessions.
- Enter general information about courses.

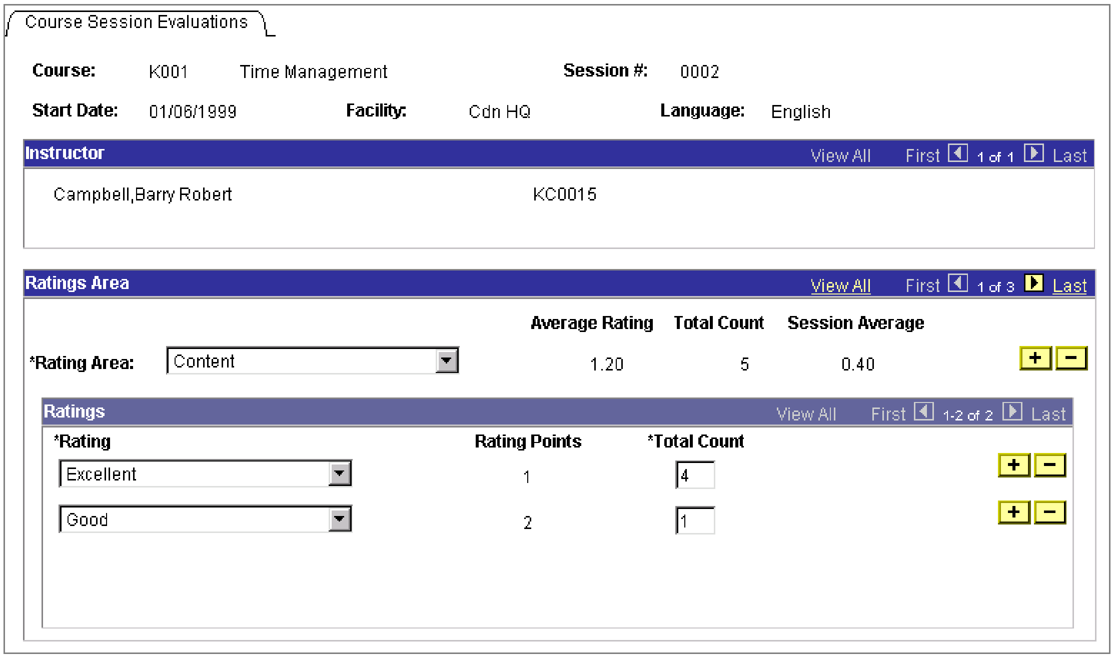
Pages Used for Recording Student Feedback

Page Name	***Object Name***	***Navigation***	***Usage***
Course Session Evaluations	COURSE_EVALUATNS	Develop Workforce, Administer Training (GBL), Use, Course Session Evaluations, Course Session Evaluations	Record student feedback on course sessions so that you know what areas need improvement.

Page Name	***Object Name***	***Navigation***	***Usage***
Individual Training Evaluation - Course Information	GVT_TRNREQ_SEC_CE1	Develop Workforce, Administer Training, Use, Individual Training Evaluation, Course Information	Enter general information about the course, including the start and end date of the course session and the course hours. Indicate whether the employee completed the entire course session, the grade obtained, and the employee's overall rating of the course.
Individual Training Evaluation - Evaluation Data	GVT_TRNREQ_SEC_CE2	Develop Workforce, Administer Training, Use, Individual Training Evaluation, Evaluation Data	Record an employee's feedback about various areas of the course such as course materials, applicability of the course, and training facilities.
Individual Training Evaluation - Comments	GVT_TRNREQ_SEC_CE3	Develop Workforce, Administer Training, Use, Individual Training Evaluation, Comments	Enter employee comments about the strong or weak aspects of the training and the employee's recommendations.

Recording Student Feedback on Course Sessions

Access the Course Session Evaluations page.



Course Session Evaluations page

If you entered a facility in the Course Session Table, the system displays the information here.

Instructor

This information comes from the Course Session Table.

Ratings Area

Rating Area — Select an option from the list: **Content, *Facility, Instructors, Materials,*** or ***Presentation.***

Average Rating — System displays the average rating for the rating area.

Total Count — System displays the number of evaluations received for the rating area. This is the sum of the **Total Count** fields in the **Ratings** group box.

Session Average — This rating is the overall average rating for the session. This is the average of the **Average Rating** values for all rating areas.

Ratings

Use this 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 evaluate the ***Content*** area of the course session, with three students giving a rating of ***Excellent*** and one student giving a rating of ***Good,*** you add one row to record the number of ***Excellent*** ratings and one row for the ***Good*** ratings.

Rating Select from the available options: ***Excellent, Good, Fair,*** and ***Poor.***

Rating Points The system displays the number of points associated with the rating you selected. The points associated with each rating are:

1 - Excellent

2 - Good

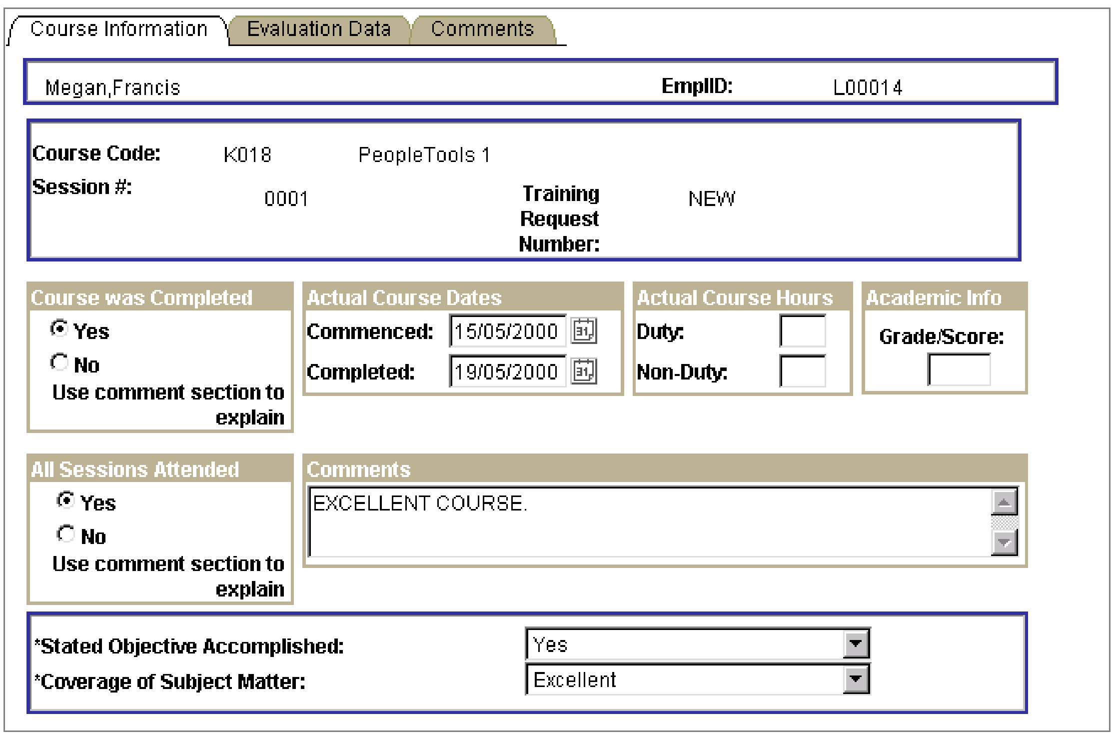
3 - Fair

4 - Poor

Total Count Enter how many students gave the rating you selected.

(USF) Entering Individual Training Evaluations

Access the Individual Training Evaluation - Course Information page.



Individual Training Evaluation - Course Information page

US Federal users can enter detailed training evaluations for individual employees.

Course was Completed Select ***Yes*** or ***No.***

All Sessions Attended Select ***Yes*** or ***No.***

Comments Optionally, enter an explanation of the responses to the preceding fields.

Actual Course Dates

Commenced and **Completed** — Enter the dates.

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 (academic information)

Grade/Score — Enter the grade or a score that was awarded upon completion of the course.

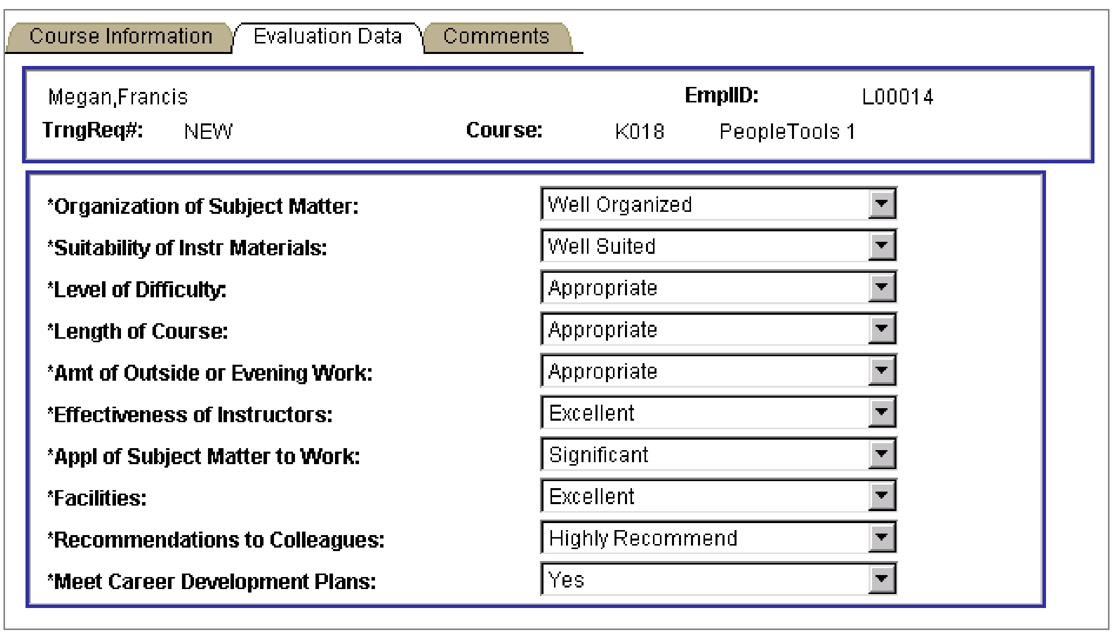
Employee's Overall Evaluation

Stated Objective Accomplished — Select ***Yes, No,*** or ***Partially.***

Coverage of Subject Matter — Select ***Poor, Adequate,*** or ***Excellent.***

Recording Employee Feedback About Various Areas of the Course

Access the Individual Training Evaluation - Evaluation Data page.



Individual Training Evaluation - Evaluation Data page

Organization of Subject Matter — Select ***Poorly organized, Adequate,*** or ***Well Organized.***

Suitability of Instr Materials (suitability of instructor's materials)	Select ***Poorly suited, Adequate,*** or ***Well Suited.***
Level of Difficulty	Select ***Appropriate, Too Advanced,*** or ***Too Elementary.***
Length of Course	Select ***Appropriate, Too Long,*** or ***Too Short.***
Amt of Outside or Evening Work (amount of outside or evening work)	Select ***Appropriate, Insufficient,*** or ***Too Much.***
Effectiveness of Instructors	Select ***Excellent, Good,*** or ***Poor.***
Appl of Subject Matter to Work (applicability of subject matter to work)	Select ***Insignificant, Adequate,*** or ***Significant.***
Facilities	Select ***Excellent, Good,*** or ***Poor.***
Recommendations to Colleagues	Select ***Highly Recommend, Recommend,*** or ***Not Recommend.***
Meet Career Development Plans	Select ***No, Yes,*** or ***Not Applicable.***

CHAPTER 8

Enrolling and Waitlisting Students

This chapter provides an overview of student enrollment options and tells you how to:

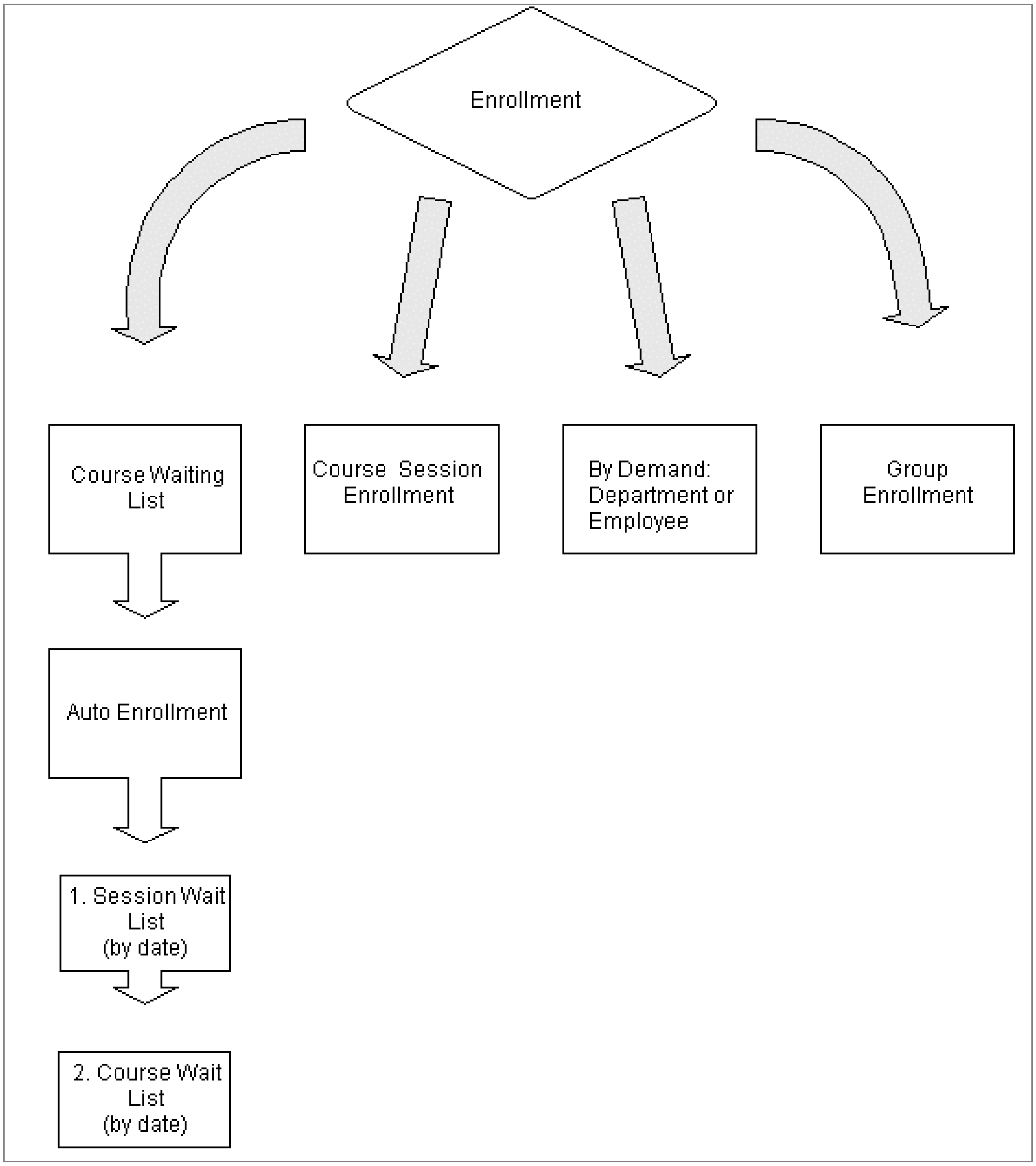
- Generate student form letters.
- Enroll students manually.
- Enroll students by department demand.
- Enroll students by employee demand.
- Enroll students by group.
- Manage waiting lists.
- Move students between course sessions.

Understanding Student Enrollment Options

The Administer Training process provides different methods of enrolling students so that you can select the best option for your organization. For example, you can:

- Set up sessions in advance and publish a training schedule that students review to make their enrollment requests.
- Set up waiting lists and create course sessions only when there are enough students on the list to fill the session.

There are a several ways to enroll a student in a course, as illustrated below.



Enrollment options

Note. 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 on 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.

Common Elements Used in This Chapter

First, Previous, Next, and **Last**	Click to display the chunk of student IDs that you want to display.
Refresh Search Fields	Click this button to clear the search criteria that you entered on the Name or ID Search page.
Search on Name or ID	Click this link to access the Name or ID Search Page, where you can filter students by name or ID.

Administering Training Letters

This section describes the process for administering training letters

You can implement automated procedures for sending a variety of form letters to students. 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.

Following is an overview of the process for generating training letters:

1. Review (and update, as needed) the letter codes on the following Administer Training pages for students to whom you'll send letters:

    - Course Auto Enroll
    - Course Session Enrollment
    - Express Rescheduling
    - Course Wait List
    - Student Training

    On this page, you can review letter codes for courses that are administered in-house.

    Once the student records have letter codes, you can generate form letters anytime.

2. Run the Training Letters report to generate form letters containing student data. You can run the report for all course sessions that are 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:

    - A Structured Query Report (SQR) to extract data from PeopleSoft Human Resources.
    - A Microsoft Word for Windows macro to merge the data into a form letter template.

- A PeopleSoft Application Engine process that sends training letters by email to students who have an email address.

From the records of students who are linked to course sessions that match the report parameters you select, the SQR extracts data containing the Letter Code *CON* (confirmation), *CAN* (cancellation), and *RSC* (rescheduling), without a Date Printed field value. When you run the Training Letters process, the system enters a Date Printed value into the student records. Then, the next time you generate letters, the system doesn't create duplicate letters for those students.

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 letters of the same type in one file.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Generating Form Letters" and "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Generating the Training Letters Report

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.

This section describes how to:

- Enroll students manually, add them or a course session waiting list, adjust existing subscriptions, and check the results of your automatic enrollment.

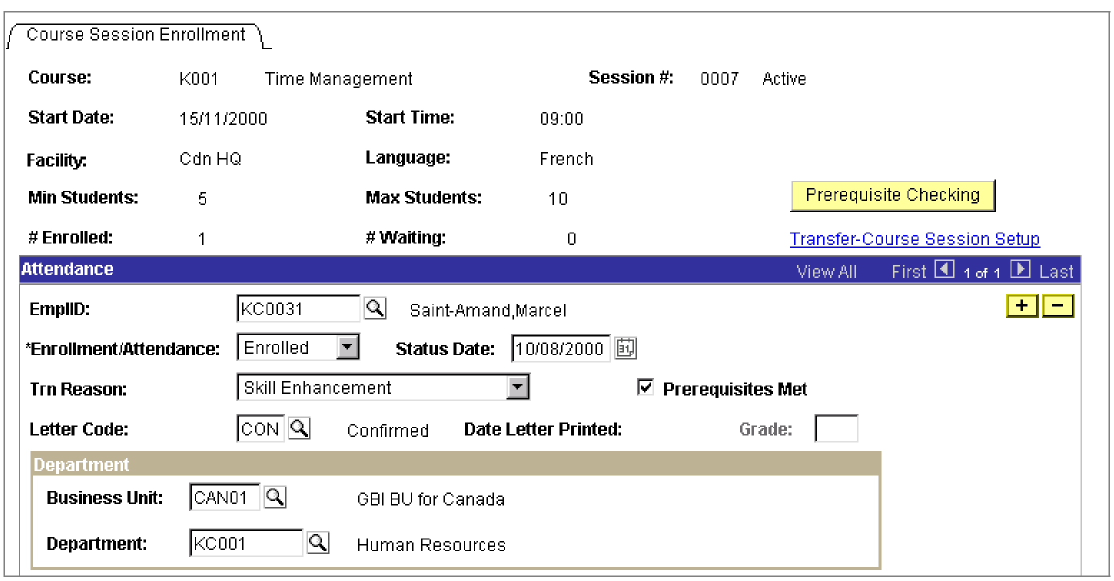
- Track employee training requests.

Pages Used to Enroll Students and Track Training Request Data

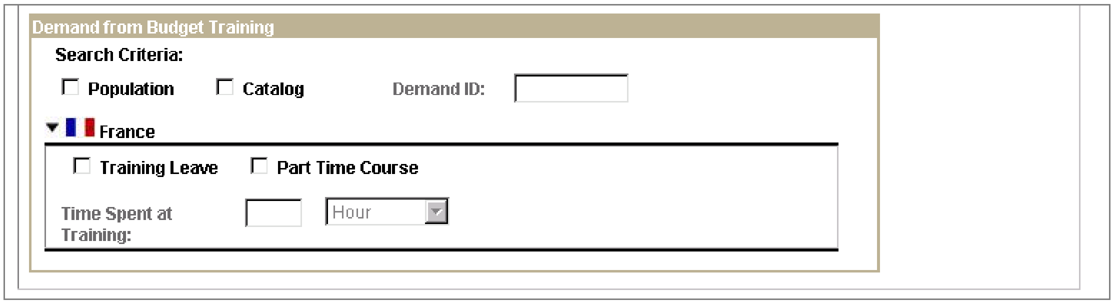
Page Name	*Object Name*	*Navigation*	*Usage*
Course Session Enrollment	COURSE_ENROLLMENT	Develop Workforce, Administer Training (GBL), Use, Course Session Enrollment, Course Session Enrollment	Enroll students, add them to a course session waiting list, and adjust to existing subscriptions. Check the results of your automatic enrollment. To adjust several student subscriptions, you might find it easier to use the Course Auto Enroll (course automatic enrollment) page.
USF- Employee Training Request Data	GVT_TREQ_DATA_A	Click the Trn Request (course training request) button on the Course Session Enrollment page.	Track employee training request data.

Enrolling Students Manually

Access the Course Session Enrollment page.



Course Session Enrollment page (1 of 2)



Course Session Enrollment page (2 of 2)

On this page, you can indicate the reasons that students are taking the course, verify that students have met course prerequisites, and add students to the session waiting list for first priority during session rescheduling.

To remove students from a session, delete the row from the page.

Prerequisite Checking

Click this button to check whether a student has met the requirements for a course before confirming final enrollment.

Transfer-Course Session Setup

Click this link to access the Course Session Table.

Enrollment/Attendance

Select a student's status from the list:

Enrolled: Enroll a student in the session.

Session Waitlist: Add a student to a session waiting list.

Note. You can change a student's status to any value except ***Course Waitlist*** or ***Currently Attending.*** To add a student to a course waiting list, use the Course Wait List page. To change a student's status to ***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, you get a warning message when you save the page.

Request: For US Federal users only. Use to enter a training request. When you've entered the training request data, PeopleSoft Workflow routes the request and tracks the process from ***Request*** to ***Authorized*** 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.

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.

Prerequisites Met — Select 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 and selects this check box if the student has met all the prerequisites.

Letter Code — To generate a form letter, select a letter code. You can change the default, which corresponds to the student's status). Values are:

CON: Used if the student's status is ***Enrolled.***

WTS: *Used if the student's status is* **Session Waitlist**.

Date Letter Printed — The system populates this field once you generate the letter.

Grade — This field is available for entry when the student's status is ***Completed.*** Select a value 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

USF - Training Request Data

The following elements are used for entering and printing training requests and appear only 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.

Trn Request — Select this check box to process training request information for an employee. The system displays the **Trn Request Data** button and the **Print SF182** button.

Trn Request Data — Click this 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 this group box, you link enrollments with a training demand (requirement) that you defined in the Budget Training business process. With this link, the system can compute the ratio between the projected costs in your Budget Training business process and the actual costs that you track in the Administer Training business process.

Select the **Population** or **Catalog** check box to sort through the available demand IDs.

Population

Select this check box and prompt for a demand ID, to look for people who have entered a demand for the current course. The system uses the employee's department information to retrieve matching demands.

If you select this check box, the system displays all Budget Training demands with the following restrictions:

- The course session start and end dates must be in the budget period of the demand.
- For individual demands, the employee of the demand must be the same as the employee ID that you entered on this page.
- For general demands, the employee ID on the Course Session Enrollment page must be on both the Demand Department list and the Demand Job list.
- The course of the demand must be the same as the enrolling course.

Catalog

Select to look for demands that are associated with the current course or with the demand category or subcategory that includes that course. The system uses the catalog hierarchy to retrieve a demand for the current course.

If you select this 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 dates must be in the budget period of the demand.
- When the demand course is ***UNKNOWN,*** the demand subcategory must include the current course.
- When the demand course is *not* ***UNKNOWN,*** the demand course must be the same as the current course.

- When the course and the subcategory for the demand are ***UNKNOWN,*** the demand category must include the current course.

Population *and* **Catalog** — If you select both check boxes, the system displays all Budget Training demands, with the following restrictions:

- The course session start and end dates must be in the demand budget period.

- For individual demands, the employee ID 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 on both the Demand Department list and the Demand Job list.
- When the demand course is ***UNKNOWN,*** the demand subcategory must include the current course.
- When the demand course is *not* ***UNKNOWN,*** the demand course must be the same as the current course.

Demand ID — When you select the search criteria, the system displays the budget training demands that match the criteria.

(FRA) France

This group box is displayed for French users only. For French companies, enter the additional enrollment information that is required for French Training Report 2483.

Training Leave — Select if the employee is taking the training course during his or her leave.

Part Time Course — Select if you're enrolling the employee in a sandwich course, where 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 that is spent training and the unit in which the time is recorded ***(Hour, Day).*** You can enter this field only if the student's status is ***Incomplete.***

See Also

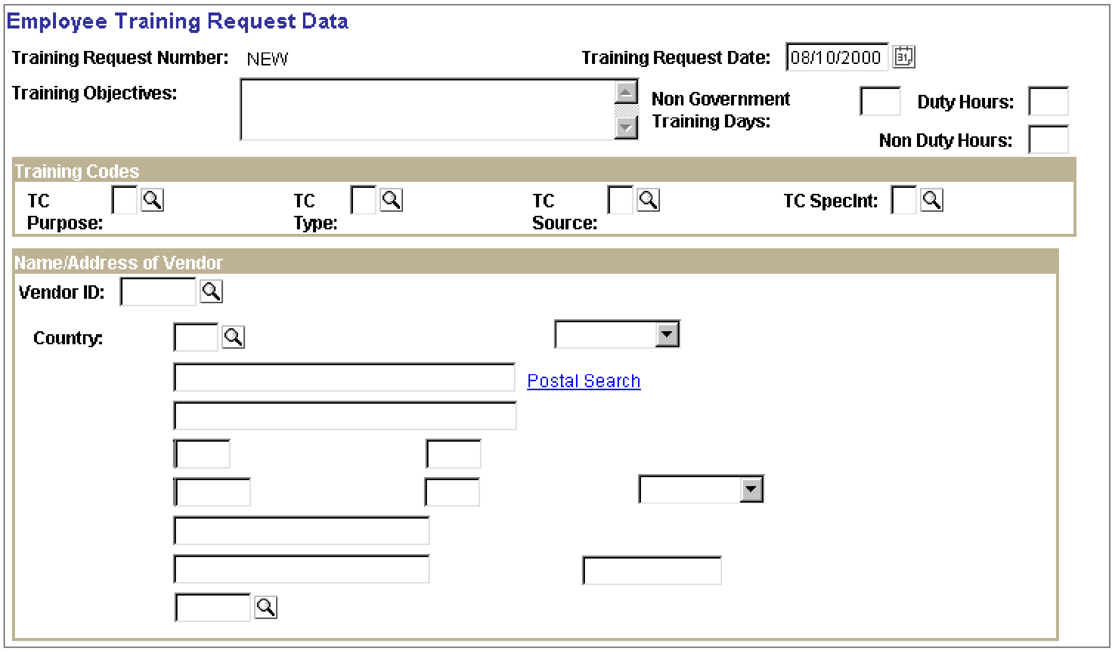
Administering Training Letters

"Determining Training Demands for Your Organization"

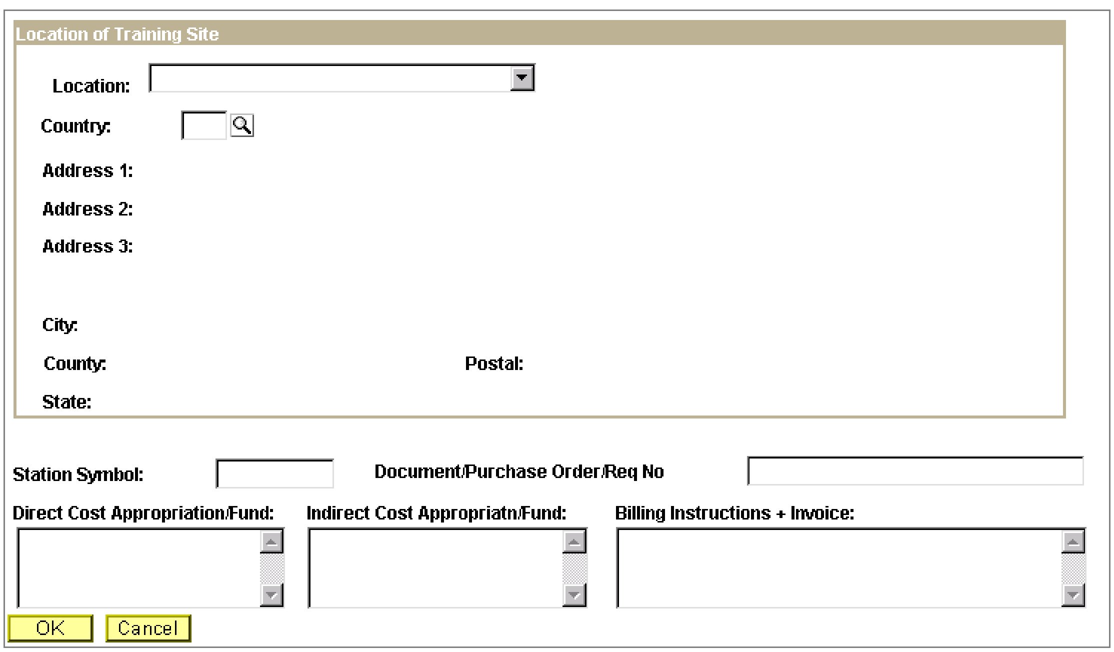
PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Adding Nonemployees and Job Applicants

(USF) Tracking Training Requests

Access the USF - Employee Training Request Data page.



Employee Training Request Data page (1 of 2)



Employee Training Request Data page (2 of 2)

Training Request Number When you first open this page, the system displays the default, ***NEW.*** When you save this page, the system assigns a number.

Training Request Date	The system uses today's date, which you can change.

Training Codes

TC Purpose (training code purpose), **TC Type** (training code type), **TC Source** (training code source), and **TC SpecInt** (training code special interest).	Select the training codes.

Name/Address of Vendor

Select the **Vendor ID.** The system populates the vendor address from the Vendor Table and makes the fields unavailable for entry.

Location of Training Site

Location	Select the location of the training site from the list. Values are: ***Same as Training Vendor:*** The system populates the address from the Vendor Table and makes the fields unavailable for entry. ***Other:*** Select if the address for the training site location is not the same as the vendor's.

Entering Estimated Costs and Billing Information

Station Symbol	Enter the 8-digit station symbol, including hyphens.
Document/Purchase Order/ Req No (document, purchase order, or requisition number).	Enter the document, purchase order, or requisition number.
Direct Cost Appropriation/Fund (direct cost appropriation or fund) and **Indirect Cost Appropriatn/Fund** (indirect cost appropriation or fund)	Enter the direct and indirect cost appropriation or fund that is chargeable and enter the appropriation or fund information.
Billing Instructions + Invoice	Describe any special billing instructions, including where to send the invoice.

Enrolling Students by Department Demand

Use the Department Demand component to enroll employees based on a Department Demand that you defined in the Budget Training business process.

This section describes how to:

- Enroll students in a course session and add students to a waiting list.
- View the employees who were successfully subscribed to the courses and sessions that you selected, check on their status, and check on the course enrollment dates.

See Also

"Defining Training Requirements," Defining Departmental Training Demands

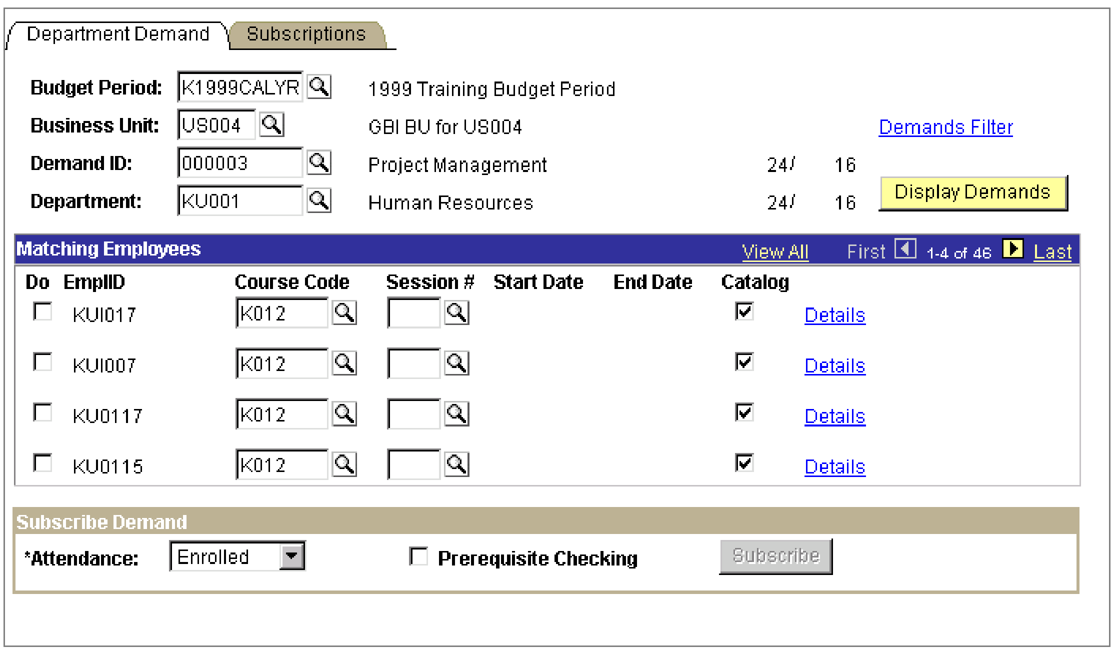
Pages Used to Enroll Students by Department Demand

Page Name	***Object Name***	***Navigation***	***Usage***
Department Demand	TRN_GNRL_DMND_ SUBS	Develop Workforce, Administer Training (GBL), Use, Enroll by Department Demand, Department Demand	Enroll students (employees who qualify for training according to a set criteria) in a course session. Add students (who are included in a department demand) to a waiting list.
Department Demand - Demands Search Criteria	TRN_GN_DMND_CR _SEC	Click the Demands Filter link on the Department Demand page.	Limit the selection to a specific course or courses within a particular category or subcategory. List employees who have subscribed to a training course and who belong to the specified business unit and department for sessions that occur within the budget period.
Department Demand - Employee / Course Details	TRN_GN_DMND_SE C	Click the Details link on the Department Demand page.	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 that session before it fills up.

Page Name	***Object Name***	***Navigation***	***Usage***
Department Demand - Subscriptions	TRN_GNRL_TRAIN_SUB	Develop Workforce, Administer Training (GBL), Use, Enroll by Department Demand, Subscriptions	View the employees who were successfully subscribed to the courses and sessions that you selected on the Department Demand page. Check on their status and the course enrollment dates.
Subscriptions - Employee / Course Details	TRN_TRAINING_SEC	Click the Details link on the Department Demand - Subscriptions page.	View information about the course session that you have selected for an employee.

Enrolling Students by Department Demand

Access the Department Demand page.



Department Demand page

Budget Period Select the budget period for the Department Demand to enroll in a course session.

Demand ID 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, the course category classifications, the budget period dates, and the employee qualification criteria.

Department	Select the department code for the students to enroll in a session. You can select only from the departments that are included in the demand ID that you specified. When you move out of the **Department** field, the system makes the **Display Demands** button available.
Demands Filter	If you want to limit the search further, click this 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 populate the **Matching Employees** group box, cancel the page and start again.
Display Demands	Click this button to populate the Matching Employees group box with employees who meet the selection criteria (such as department and job codes) that are defined in the demand ID.

Matching Employees

Do	Select the **Do** check box next to each employee ID to enroll in the selected course or add to the waiting list for the selected course or session.
Course Code	Select the course the employee is to attend. The default (which you can change) is the department demand ID that you selected.
Session # (session number)	Select a session number for the course code that you selected. If you select a session that isn't within the budget period for this demand, you get a warning message. 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.
Details	Click this link to access the Enroll by Department Demand – Subscriptions page, where you can view the employee's name and the details of the course session that you selected.

Subscribe Demand

In this group box, you enroll the employees or add them to the course or session waiting list.

Attendance	Select a value from the list: ***Enrolled*** (the default value).

Crse Wait (course waitlisted).

Sessn Wait (session waitlisted).

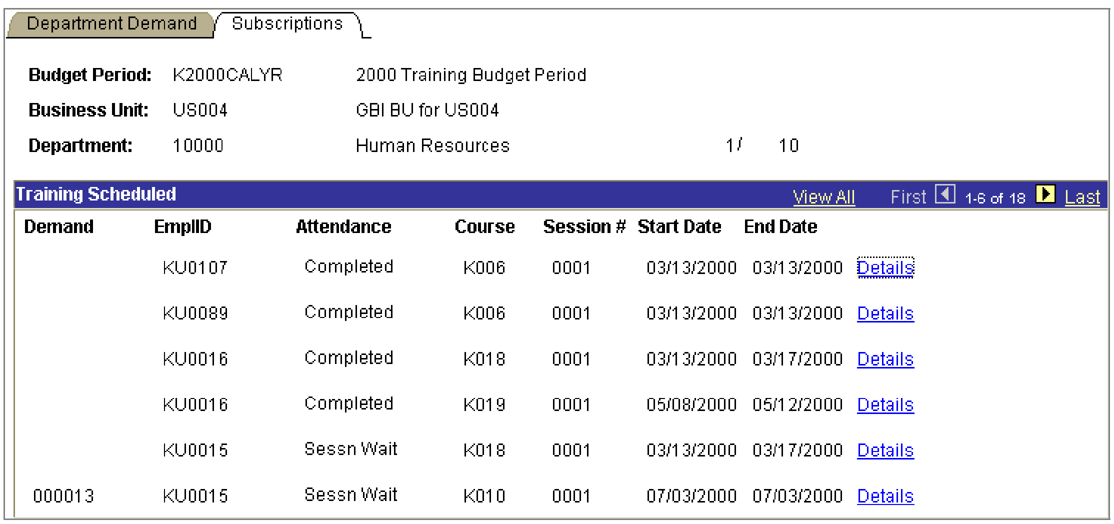
If you've already found matching employees and have reset the **Attendance** field, the system clears any session information that you entered.

Prerequisite Checking Select if the system is to check to see if your students have met the prerequisites for a course specified in the Course Table. Students who haven't met the prerequisites won't be enrolled in the course when the system processes the request.

Subscribe Once you have selected the employees whom you want to enroll or add to the waiting list, click this button. Depending on the **Attendance** value that you selected, the system enrolls or waitlists students for whom you selected the **Do** check box.

Viewing Subscribed Employees

Access the Enroll by Department Demand - Subscriptions page.


Department Demand | Subscriptions

Budget Period: K2000CALYR 2000 Training Budget Period

Business Unit: US004 GBI BU for US004

Department: 10000 Human Resources 1/ 10

Training Scheduled — View All First 1-6 of 18 Last

Demand	EmplID	Attendance	Course	Session #	Start Date	End Date	
	KU0107	Completed	K006	0001	03/13/2000	03/13/2000	Details
	KU0089	Completed	K006	0001	03/13/2000	03/13/2000	Details
	KU0016	Completed	K018	0001	03/13/2000	03/17/2000	Details
	KU0016	Completed	K019	0001	05/08/2000	05/12/2000	Details
	KU0015	Sessn Wait	K018	0001	03/13/2000	03/17/2000	Details
000013	KU0015	Sessn Wait	K010	0001	07/03/2000	07/03/2000	Details

Enroll by Department Demand - Subscriptions page

Training Scheduled

In this group box, the system lists employees who were enrolled or waitlisted in the courses and course sessions that you selected on the Department Demand page.

Click the **Details** link to access the Employee / Course Details page, where you can view the employee's name and the details of the course session.

Enrolling by Employee Demand

Use the Enroll by Employee Demand component to enroll your employees for training with the employee demand profile. This component is nearly identical to the Enroll by Department Demand component.

See Also

"Defining Training Requirements," Determining Training Demands for Your Organization

Enrolling by Department Demand

Pages Used to Enroll by Employee Demand

Page Name	*Object Name*	*Navigation*	*Usage*
Employee Demands	TRN_EMPL_DMND_SUBS	Develop Workforce, Administer Training (GBL), Use, Enroll by Employee Demands, Employee Demands	Select the approved Employee Demands to enroll in the requested courses which you set up on the Employee Demand Profile page or the Employee Demand by Course page.
Employee Demands - Demands Search Criteria	TRN_EE_DMND_CR_SEC	Click the Demands Filter link on the Employee Demands page.	Limit the selection to a course or courses in a particular category or subcategory.
Employee Demands - Employee / Course Details	TRN_EE_DMND_SEC	Click the Details link on the Employee Demands page.	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 in the course session before it fills up.

Page Name	Object Name	Navigation	Usage
Employee Demands - Subscriptions	TRN_EMPL_TRAIN_ SUB	Develop Workforce, Administer Training (GBL), Use, Enroll by Employee Demands, Subscriptions	View the employees who were successfully subscribed to the courses and sessions that you indicated on the Employee Demands page. Check on their status and course enrollment dates.

Enrolling Students by Group

Use the Group Enrollment component to enroll some or all members of a group in a training course.

This section describes how to:

- Select students from a group to subscribe (enroll or waitlist) to a course.
- View the students who were subscribed to the selected courses and sessions.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Groups"

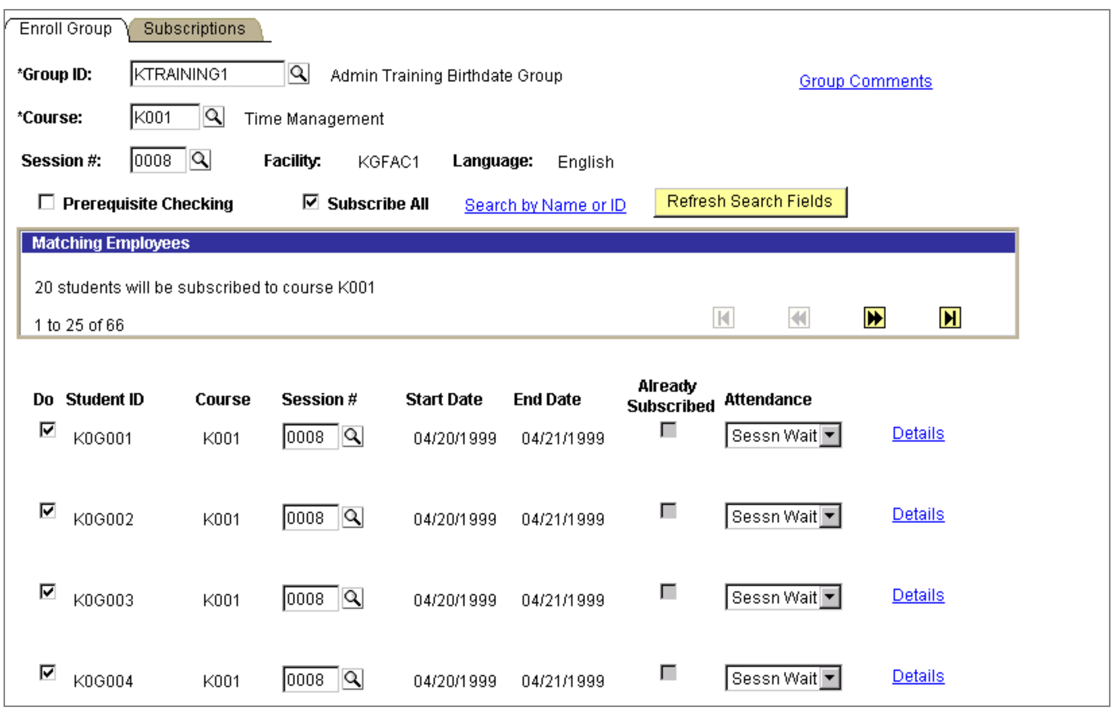
Pages Used to Enroll Students by Group

Page Name	Object Name	Navigation	Usage
Enroll Group	TRN_GRP_ENROLL_ GBL	Develop Workforce, Administer Training (GBL), Use, Group Enrollment, Enroll Group	Select students from a group to subscribe (enroll or waitlist) for a course.
Comments	TRN_GRPDESCGBL_ SEC	Click Group Comments on the Enroll Group or Group Enrollment - Subscriptions page.	View a description of the group that is selected on the Enroll Group page and the selection criteria that was used to build the group.
Enroll Group - Name or ID Search	TRN_GRPSON1GBL_ SEC	Click the Search by Name or ID link on the Enroll Group page.	Select specific members of the group to enroll or add to waiting lists.

Page Name	***Object Name***	***Navigation***	***Usage***
Enroll Group - Employee/Course Details	TRN_GRP_ENRGBL_SEC	Click the Details link on the Enroll Group page.	View the details of the course session for which the selected employee is enrolled or waitlisted.
Group Enrollment - Subscriptions	TRN_GRP_SUBS_GBL	Develop Workforce, Administer Training (GBL), Use, Group Enrollment, Subscriptions	View the students who were subscribed to the courses and sessions indicated on the Enroll Group - Employee/Course Details page.
Group Enrollment - Subscriptions - Name or ID Search	TRN_GRPSON2GBL_SEC	Click the Search on Name or ID link on the Group Enrollment - Subscriptions page.	Select the members of the group whose details you want to view.

Enrolling Students by Group

Access the Group Enrollment - Enroll Group page.



Group Enrollment - Enroll Group page

Group ID	Select the group ID from the list of values.
Group Comments	Click this link to access the Comments Page, where you view a description of the group and the group definition.

Course	Select a course from the list. When you move out of this field, the system displays the course name. If the course is multilingual, a message tells you to select a course session.
Session # (session number)	Select the session number from the list. This field is required for multilingual courses that don't have course waiting lists. Be sure to select a session in a language that is appropriate for the group.
Facility	If you completed the **Session #** field, the system completes this 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 this field from the Course Session Table. This field is unavailable for entry.
Prerequisite Checking	Select if the system is 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.
Subscribe All	Select if the system is to select the **Do** check box for students who are listed in the **Matching Employees** group box. This is useful for large groups of students.

Student Chunking Controls

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.

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 the IDs of students who meet the search criteria.

Load Students	The system hides this button after populating the **Matching Employees** group box and displays the button again when you select new search criteria or click the **Refresh Search Fields** button.

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.

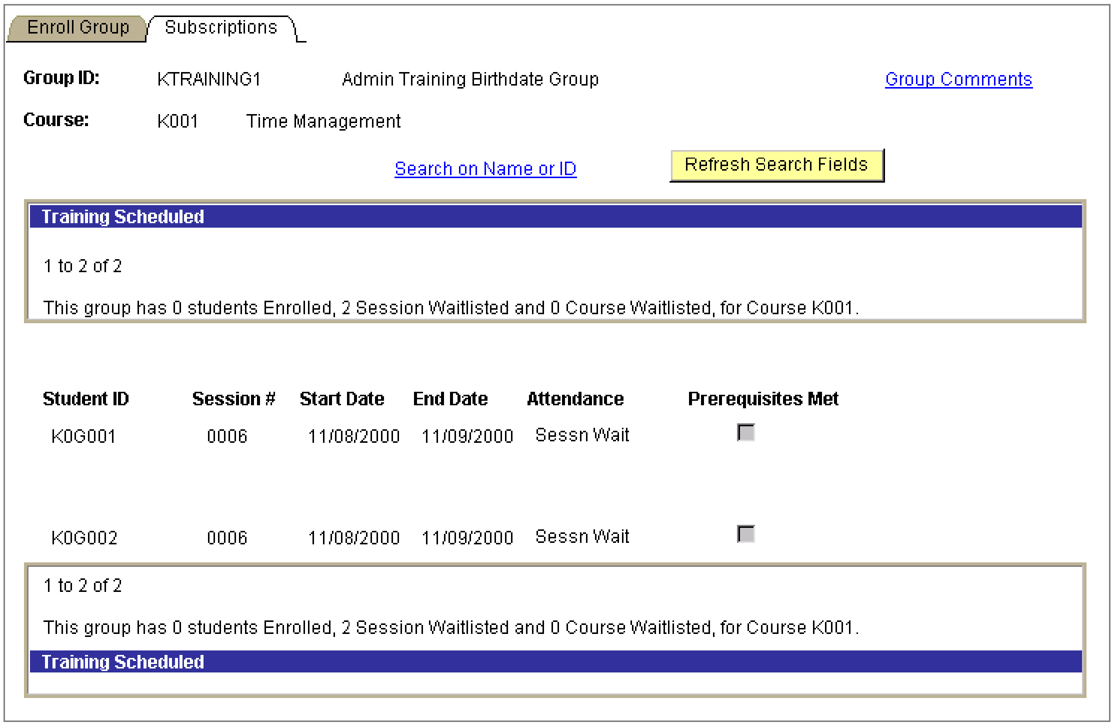
The system reviews each student's training records to find out if the student has attended the course.

Do	Select 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, the system enrolls the student only if the **Do** check box is selected. The system ignores the rows of data where the **Do** check box is cleared. The system selects **Do** if you selected the **Subscribe All** check box. Clear **Do** if you don't want to update the student's training data.
Student ID	The system displays the employee or nonemployee ID in this field and makes the field unavailable for entry. To display the student's full name, click the **Details** link.
Course	The system populates this field with the course code that you selected and makes the field unavailable for entry. To select a different course for the group, update the **Course** field at the top of the page and rerun the search.
Session #	For a student with an **Attendance** of ***Enrolled*** or ***Sessn Wait***, the system displays the session number in this field. You can change the course session without affecting other students in the list. For students with an Attendance of ***Crse Wait,*** the **Session #** field is blank. To add the student to a course session, select the session from the list. When you move out of the field, the system clears the Attendance field; you must set it to ***Sessn Wait*** or ***Enrolled.*** If the student has completed the course, the system displays the session number and makes the field unavailable for entry.
Start Date and **End Date**	If the student's **Attendance** is set to ***Enrolled, Sessn Wait,*** or ***Completed,*** the system populates the **Start Date** and **End Date** fields from the Course Session Table and makes the fields unavailable for entry.
Already Subscribed	The system selects this check box if a student has already been enrolled in a course session or added to a waiting list through 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.*** **Attendance** values are: ***Crse Wait:*** The student is on the course waiting list. The system sets **Attendance** to ***Crse Wait*** if the student hasn't been enrolled or waitlisted for the course and the **Session #** field is blank. To enroll or add the student to a session waiting list, select ***Enrolled*** or ***Sessn Wait*** and complete the **Session #** field (optional). ***Enrolled*****:** The student is enrolled in the selected course session. When you first click the **Load Students** button, you see ***Enrolled*** only if the student was previously enrolled in the course session (the system doesn't enroll students on this page). ***Sessn Wait:*** 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 number. To enroll the student in the session, change **Attendance** to ***Enrolled.*** If you have reached the maximum number of students for the course session, you get a warning message. ***Completed:*** The student has completed the course. Once a student has completed a course, you can't enroll that person in the course again, and all fields in that row are unavailable for entry. You can't set a student's **Attendance** to ***Completed*** on this page; if you select ***Completed,*** you get an error message. To set a student's status to ***Completed,*** update the course session status on the Course Table - Course Profile page.
Student/Course Details	Click this button to access the Employee/Course Details page, where you can view the student's full name and the course session details.

Viewing Subscribed Employees.

Access the Group Enrollment - Subscriptions page



Group Enrollment - Subscriptions page

Group Comments Click to access the Comments page, where you can view a description of the group and the group definition.

Using Student Chunking Controls

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 IDs of students who meet the search criteria.

Load Students Click the **Load Students** button to display the results of a new search.

The system hides the **Load 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.

Training Scheduled

This group box lists the students in the group who are scheduled to attend the selected course.

When you click the **Load Students** button, the system populates the **Training Scheduled** group box with students who match the search criteria that 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.

Prerequisites Met — If you selected this check box on the Enroll Group page, the system checks to see if students have met the course prerequisites. When you display the Subscriptions page, the system selects this check box if the student has met the course prerequisites and clears it if the student has not.

You set up course prerequisites on the Course Table - Prereqs, Goals page (course table - prerequisites, goals page).

Managing Waiting Lists

In this component, you set up new course sessions only when enough students want to take a particular course. You put students on waiting lists and track course demand. You can review the lists to determine when to create new sessions and ensure enrollment fairness by enrolling students in the order that they were added to the waiting list.

This section describes how to:

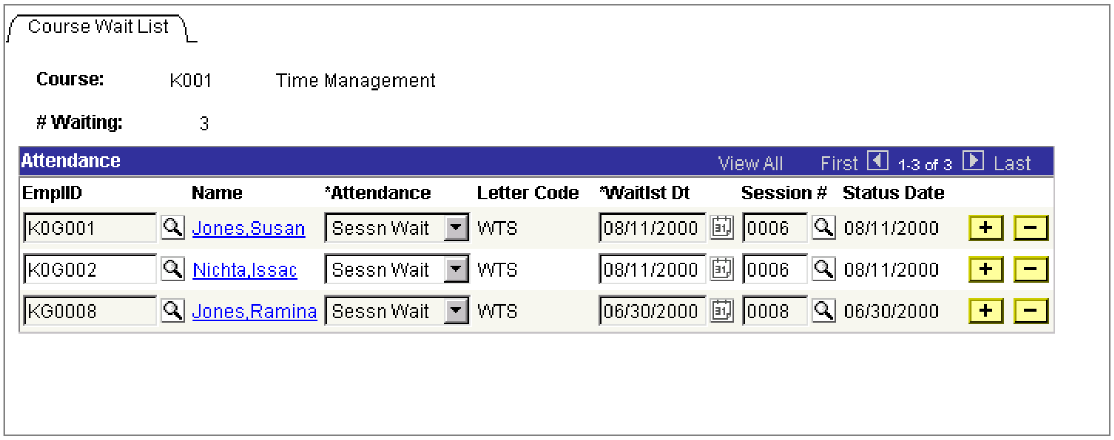
- Add students to waiting lists and assign the enrollment status.
- Enroll students in a course session automatically.

Pages Used to Manage Waiting Lists

Page Name	***Object Name***	***Navigation***	***Usage***
Course Wait List	COURSE_WAIT_LIST	Develop Workforce, Administer Training (GBL), Use, Course Waiting List, Course Wait List	Add students to waiting lists and assign the enrollment status.
Course Waitlist Details	CRSE_WAITLIST_SEC	Click the student's Name on the Course Wait List page.	View details of the course or course session for which the selected student is waitlisted.
Course Auto Enroll Page	COURSE_AUTO_ENROLL	Develop Workforce, Administer Training (GBL), Use, Course Auto Enrollment, Course Auto Enroll	Enroll students in a course session automatically.

Adding Students to Waiting Lists

Access the Course Wait List page.


Course Wait List

Course: K001 Time Management

 # Waiting: 3

Attendance — View All — First 1-3 of 3 Last

EmplID	Name	*Attendance	Letter Code	*Waitlst Dt	Session #	Status Date
K0G001	Jones,Susan	Sessn Wait	WTS	08/11/2000	0006	08/11/2000
K0G002	Nichta,Issac	Sessn Wait	WTS	08/11/2000	0006	08/11/2000
KG0008	Jones,Ramina	Sessn Wait	WTS	06/30/2000	0008	06/30/2000

Course Wait List page

Attendance

The **Attendance** group box lists the students who are on the waiting list for the selected course. You can add employees and nonemployees to a waiting list. Insert additional rows to add students.

Name The system completes the name when you select the employee ID. Click the student's name to access the Course Auto Enroll page, where you can view more information about the course session that you selected.

Attendance Select an **Attendance** from these two options (the other **Attendance** options aren't valid for this page):

Crse Wait: Enroll the student in any session of the course that becomes available. You haven't set up any open sessions for the student to request.

Sessn Wait: Waitlist the student for a particular course session. To select this status, you must have created the session in the Course Session Table and given it a status of *Active*. Students with a ***Sessn Wait*** status have 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 waitlisted students, the letter code is ***WTC;*** 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.

Waitlist Dt

The **Waitlist Dt** uses the system date as the default; you can override the default if the student has 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. Nonemployees appear after employees, using the same sort sequence. This is the same sequence that the system uses for automatic enrollment.

Session #

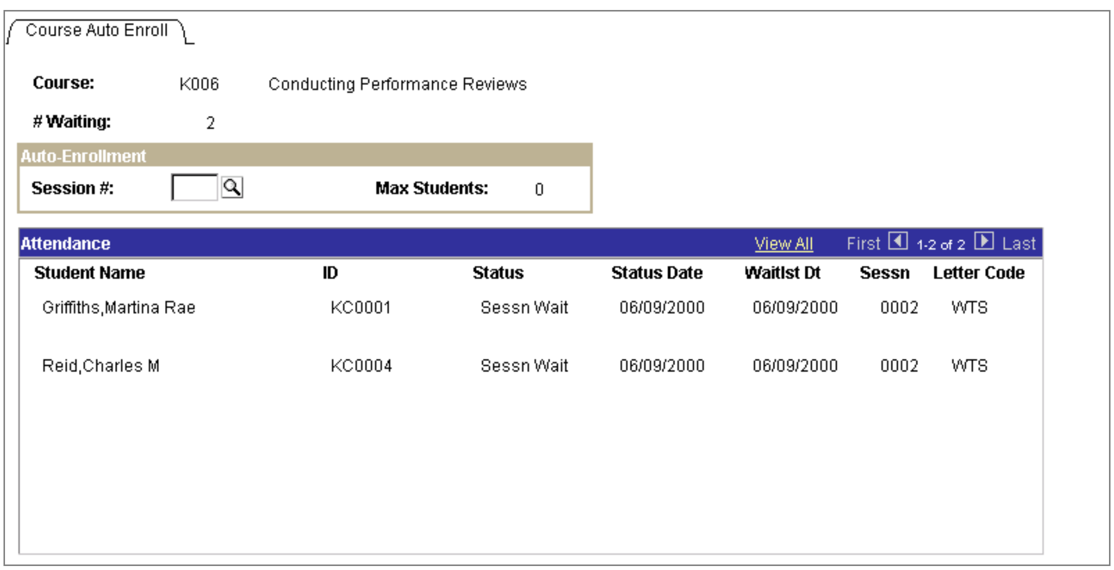
If you selected an **Attendance** value of ***Sessn Wait,*** select the session number from the list of *Active* sessions. When you leave this field, the system completes the **Start Date, Facility,** and **Language** (if it's a multilingual course) fields.

Status Date

This field is unavailable for entry. The system uses the system date, usually today's date, as the default date.

Enrolling Students Automatically

Access the Course Auto Enroll page.



Course Auto Enroll

Course: K006 Conducting Performance Reviews

 # Waiting: 2

Auto-Enrollment

Session #: **Max Students:** 0

Attendance View All First 1-2 of 2 Last

Student Name	ID	Status	Status Date	Waitlst 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

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 *Active,* and entered a maximum number of students per session.

If you've set up lists for students who are waiting for courses or sessions, you can streamline the enrollment process by using automatic system enrollment. The Course Auto Enroll page saves you from enrolling students one by one and ensures that students are enrolled in the right order.

If you've given a student a status of ***Sessn Wait*** for several sessions of a course and one status of ***Crse Wait,*** when the student is automatically enrolled, the system deletes all the other data rows on the waiting list for this student for this course.

Note. If you're managing training budgets, the Course Auto Enroll process links costs to the appropriate department and/or demand in the Budget Training business process. This isn't necessarily the department in which the employee works, as specified on the Job Record, but it is the department to be billed for the employee's training costs.

Auto-Enrollment

Session # To start automatic enrollment, select a session number from the list.

When you move out of the field, the system issues one of two messages:

- If the session is full, then the message says that the session is over-enrolled. Click **OK** and select another session number, or click **Cancel**.
- If the session isn't full, the message indicates how many slots are available in the session. Click **OK.** The system enrolls students up to the maximum number allowed for the session, as shown in the **Max Students** (maximum number of students) field.

The system first enrolls students who are on the waiting list for the session—where the **Status** is ***Sessn Wait,*** and the **Sessn** value matches the session that you selected in **Session #.**

Attendance

When you first open this page, the **Attendance** group box shows all employees and nonemployees who are on the 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 *(Sessn Wait*** students have first priority; ***Crse Wait*** students, second priority), then by **Waitlist Dt,** and then by **ID.** Nonemployees appear after employees, using the same sort sequence.

Once you select the session number, the system updates the student details. Then all students who are enrolled in the course session have a status of ***Enrolled.*** The system also displays a **Letter Code** value of ***CON,*** so that you can generate form letters informing students of their enrollment.

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.

See Also

Administering Training Letters

Moving Students Between Course Sessions

Use the Express Rescheduling component to review and update information about students who are enrolled in active sessions of a 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, to send to students.

Using this page, you can change student status (to avoid enrollment confusion), but you can't add or remove students.

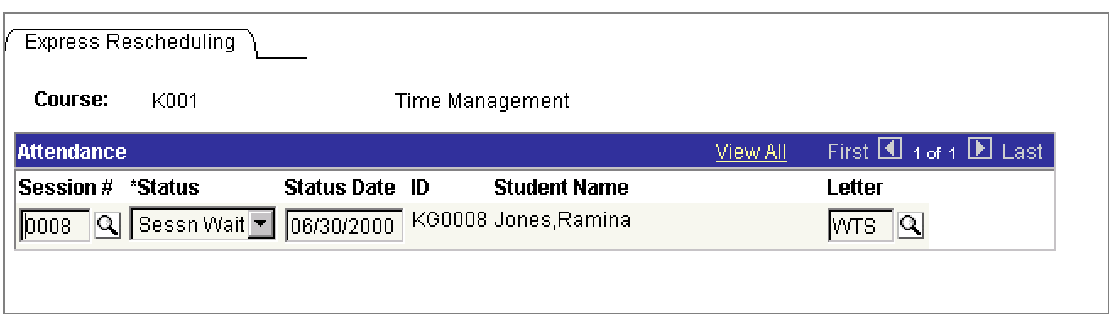
This section describes how to move students between sessions.

Page Used to Move Students Between Course Sessions

Page Name	***Object Name***	***Navigation***	***Usage***
Express Rescheduling	COURSE_RESCHEDULE	Develop Workforce, Administer Training (GBL), Use, Express Rescheduling, Express Rescheduling	Move students between course sessions.

Moving Students Between Sessions

Access the Express Rescheduling page.



Express Rescheduling page

Attendance

Session # System-displayed if the student is enrolled or waitlisted for a course session. To enroll a student in a session, select the session number.

Status System-displayed; you can change the status. Values are:

Enrolled: Enroll a student in the session that you selected in the **Session #** field.

Crse Wait

Sessn Wait

Status Date When you select a different status for a student, the system updates this field. You can change the date.

Letter Code This code changes according to the status that you select. The next time you generate training letters, the system creates a letter of the type that is defined by the letter code.

Note. If the number of enrolled students in a session exceeds the maximum number allowed, you get a warning message.

See Also

Administering Training Letters

CHAPTER 9

Tracking Student Training

This chapter provides an overview of student training and tells you how to:

- Maintain student training data.
- Track federal training requests.
- Review training-related employee data.

Understanding the Tracking of Student Training

By tracking student training, you ensure 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 both internal and external (off-site) courses for both employees and non-employees, such as contractors or temporary workers.

To place students in the right courses and in the right order, you can view summary training data online. To view all aspects of employee training and development, you can review and update training-related employee data, such as education and certifications.

Accessing Student Data

You use the Student Training, Student Training Summary, and Tuition Reimbursement pages to retrieve, view, and update data for 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. The search records for these pages are set up to search for student IDs only—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 employee ID. You can also search by the student's Name and Last Name. If you are using Alternate Character functionality to record alternate character names for employees, you can enter an AC Name (alternate character name).

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Working With Languages," Working With Double-Byte Characters

Maintaining Student Training Data

Use the Student Training pages to:

- View an employee's training history, including:
    - Courses taken outside your organization.
    - Courses taken in-house.
    - Training received before joining your enterprise.
- Enter courses that students are attending or have completed for which you don't administer sessions in-house.
- Review course sessions that students have taken or will take (that are administered in-house) and enroll the students on the spot.
- Track course results for employees and non-employees.

You can also track courses that employees took before joining your organization.

When you add students to waiting lists and enroll them in sessions that are administered in-house, the system adds and updates data rows in Student Training. You can review and update that information.

To enroll or waitlist students in training course sessions, use the Course Waiting List page or the Student Course Enrollment - Course Session Enrollment page. When students have completed sessions, you can enter their course grades on this page.

Note. If you're working with training budgets, use the Student Training – Demand from Budget Training page to specify how outside courses are 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 uses (as the default) the budget information that you specified in the Department group box on the Course Session Enrollment page (COURSE_ENROLLMENT).

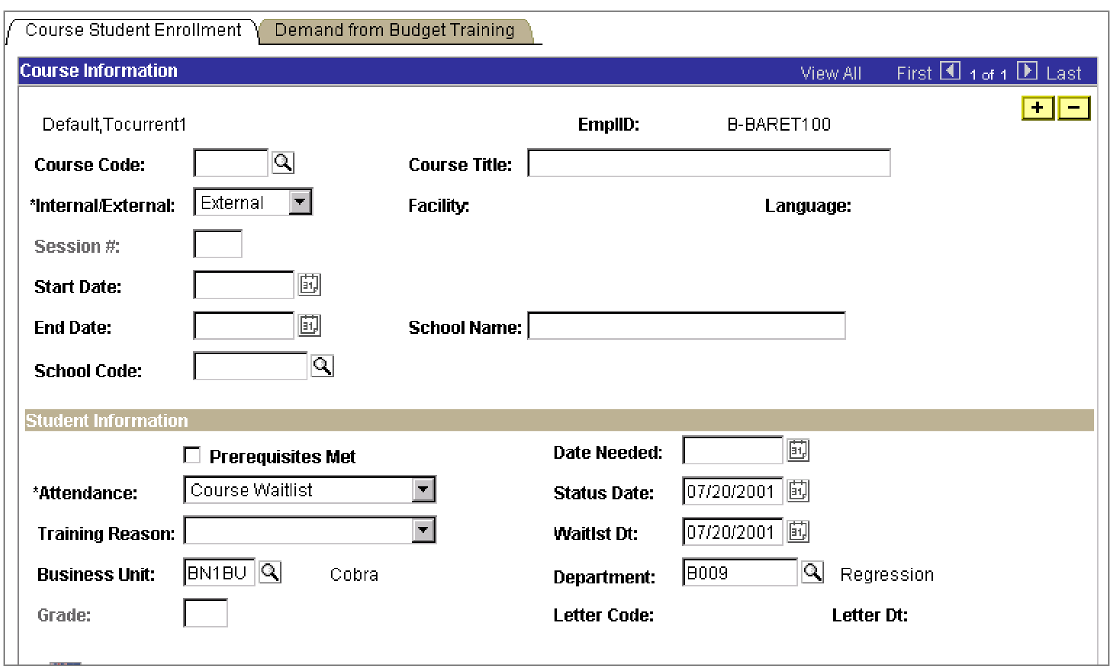
Pages Used to Maintain and Review Student Training Data

Page Name	*Object Name*	*Navigation*	*Usage*
Student Training - Course Student Enrollment	COURSE_STUDNT_ENRL	Develop Workforce, Administer Training (GBL), Use, Student Training, Course Student Enrollment	Review or enter student and course information.

Page Name	***Object Name***	***Navigation***	***Usage***
Student Training - Demand from Budget Training	COURSE_STUDNT_ENR2	Develop Workforce, Administer Training (GBL), Use, Student Training, Demand from Budget Training	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.
Student Training Summary	TRN_STUDNT_CRS_SUM	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	Review student training to determine whether students are receiving adequate training for their jobs or have taken all course prerequisites. Useful for career and succession planning.

Entering or Reviewing Student and Course Information

Access the Student Training - Course Student Enrollment page.



Student Training - Course Student Enrollment page (1 of 2)

Student Training - Course Student Enrollment page (2 of 2)

You have specified a business unit and department information for billing. Now link the student course information to a demand ID in your budget training plan so that the system can process training costs against your training budget. If the student is taking or has taken an outside training course, enter information about how that course should be tracked as part of a demand ID. The system displays the complete training history for the selected employee or non-employee.

Course Information

For course sessions that are administered in-house, the system displays the data from the Course Session Table and Course Session Enrollment page and makes some fields unavailable for entry.

To enroll the student in a course that 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 that is not administered in-house, and if the course is in your Course Table, select the course code. Otherwise leave the field blank and enter the course name in the **Course Title** field.

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 displayed, enter the course name.

Internal/External

System-displayed if you entered a course code. If the value isn't displayed, select ***Internal*** or ***External.***

Facility

Language

Session # (session number)

Min (minimum students),

Max (maximum students)

 # Enrolled

 # Waiting

System-displayed. These fields apply only to course sessions that are administered in-house.

Start Date, End Date **Start Time, End Time**	System-displayed if the course session is administered in-house. If dates and times aren't displayed, enter them here.
Letter Code	System-displayed. Applies only to course sessions that are administered in-house.
Letter Dt (letter date)	If you printed the administer training letter with the code that is specified in the **Letter Code** field, the system displays the date that the letter was printed. This field applies only to course sessions that are administered in-house.
School Name	Enter the name of the school if there is no corresponding school code.
School Code	Select the school code from the available options.

(USF) Training Request Data

The elements in this group box appear only for US Federal users.

Enter a training request to request a training session and track the student training processes. Processes include:

- Accessing student data.
- Maintaining students' training data.
- Viewing training summary information.
- Tracking student tuition reimbursement.
- Reviewing training-related employee data.

To process training requests, set the Enrollment/Attendance field to *Request*.

Training Request Required	Select to process training request information for an employee. The **Training Request Data** and **Print SF182** buttons appear.
Training Request Data	Click this button to display the USF - Employee Training Request Data page.

Student Information

Prerequisites Met	Select to indicate that an employee or non-employee has met the required prerequisites or training before enrolling in a course that has specific requirements.
Date Needed	Enter the date when the student should have completed this course.
Attendance	System-displayed if the course session is administered in-house. Changing the status may affect session

enrollments, so go to the Course Session Enrollment page to make other adjustments, such as moving a student from the waiting list into the course. You can update the status of enrolled students to ***Completed*** here or on the Student Course Enrollment - Course Session Enrollment page.

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.

Status Date The default is the system date, which you can change.

Training Reason Select a reason from the list of options.

Waitlst Dt (waitlist date) System-displayed if the student's Status is *Crse Wait* (course wait). This field applies only to courses that are administered in-house.

Business Unit System-displayed if:

- The course is administered in-house.
- The course is administered outside of your organization and won't be administered using the Course Session Enrollment page.
- The course information is new, regardless of whether it is administered in-house or outside.
- The student is a non-employee (the non-employee's business unit information comes from the Add Non-Employee component).

If the training is billed to a different business unit, select the unit from the list of options.

Note. For budget processing purposes, link the course to a demand ID on the Student Training - Demand from Budget Training page.

Department This field is system-displayed if the any of the conditions cited in the **Business Unit** field apply to this field.

If the training is billed to a different department, select the department from the list of options.

Grade If the student has completed the course, enter a grade.

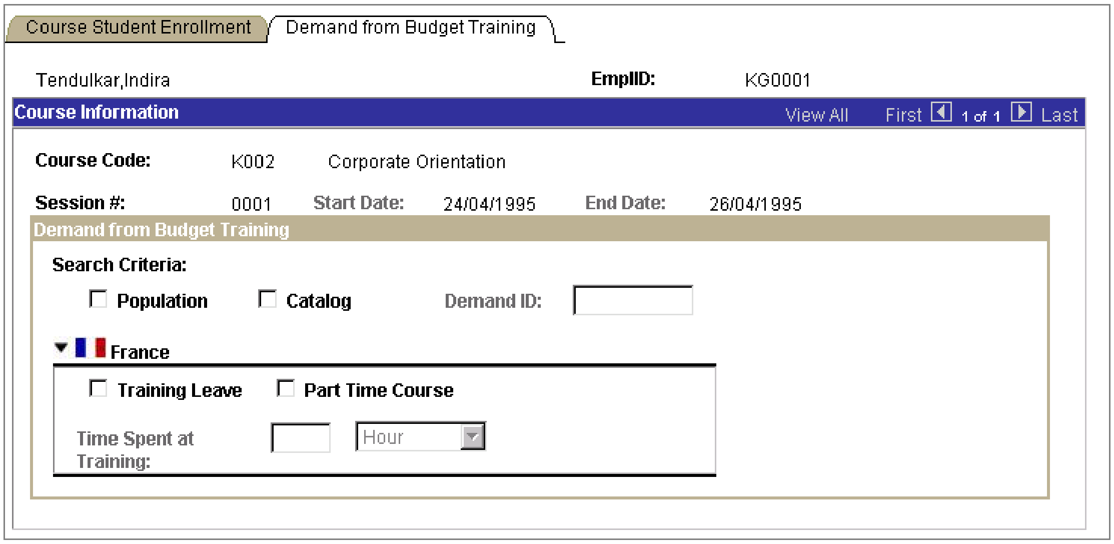
(AUS) Australia

Australian government requires Study Bank tracking information on approved courses and training. Record weekly information on study and travel hours per employee.

Study hrs/wk (study hours per week)	Record the number of employee hours that were spent in courses and training.
Travel hrs/wk (travel hours per week)	Record the number of employee hours spent in travel.

Specifying Business Unit and Department Billing Information.

Access the Student Training - Demand from Budget Training page



Student Training - Demand from Budget Training page

Demand from Budget Training

In this group box, you link enrollments with a training demand (requirements) that you defined in the Budget Training business process. With this link, the system computes the ratio between the planned costs in your Budget Training business process and the actual costs for training that you track in the Administer Training business process.

To locate the right demand ID, use the check boxes under **Search Criteria:**

- Select **Population** to search for demands that match the employee's Department, Job Code, and Competencies.
- Select **Catalog** to search for demands that match the **Course Code** value.
- Select both **Population** and **Catalog** to search for all possibilities.

See Also

"Defining Training Requirements," Determining Training Demands for Your Organization

(FRA) France

Training Leave	Select if the training course is to be taken during an employee's leave.
Part Time Course	Select if you're enrolling the employee in a sandwich course, where the employee gains work experience while studying.
Time Spent at Training	If you selected **Part Time Course,** enter the amount of time that was spent in training and select the unit in which the time is recorded: ***Hour*** or ***Day.*** You can complete **Time Spent at Training** only if the student has a status of *Incomplete.*

(USF) Tracking Training Requests

This section is for US Federal users to track training requests according to US Federal requirements. It describes how to track and review the courses that a student has requested.

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 enrolls or waitlists the students.

Pages Used for Training Tasks

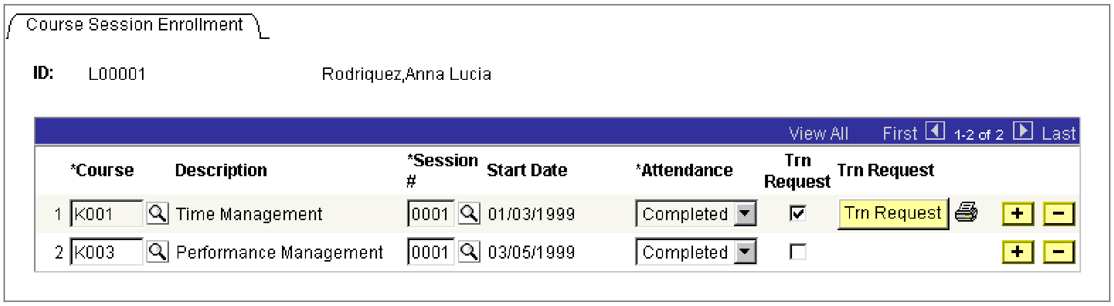
- To request training, use the Student Course Enrollment - Course Session Enrollment page.
- To directly enroll or waitlist students in training course sessions, and to enter students' grades for completed sessions, use the Course Wait List page or the Student Course Enrollment - Course Session Enrollment page.
- To review and print an employee's training request information, use the Student Course Enrollment – Course Session Enrollment page or the Student Training Summary page.

Page Used to Track Courses

Page Name	***Object Name***	***Navigation***	***Usage***
Student Course Enrollment - Course Session Enrollment	CRSE_ENRL_WL	Develop Workforce, Administer Training (GBL), Use, Student Course Enrollment, Course Session Enrollment	Track and review the courses that an individual student has requested and print the Training Request Form (SF182).

Tracking and Reviewing Requested Courses

Access the Student Course Enrollment - Course Session Enrollment page.



Student Course Enrollment - Course Session Enrollment page

Course, Session #, Attendance	To add a course, insert a row and select the course, session number, and attendance status.
Trn Request (training request)	Select to process training request information for an employee or non-employee. When you select this check box, the **Trn Request** and **Print SF182** buttons appear.
Trn Request	Click this button to view the USF - Employee Training Request Data page, where you can enter or view the training request information.
	Click the **Print SF182** button to print the Training Request Form (SF-182). The form is printed after you have completed and saved training request information.

Reviewing Training-Related Employee Data

As you administer training programs, you can review and update other employee training-related information, such as education, competencies and languages, and the results of tests. You can use several pages in the Administer Training menu for tracking the additional information that you need for employees and non-employees.

You can review and update training-related employee data on the following pages:

- Competencies
- Education
- Licenses/Certifications
- Memberships
- Languages
- Test Results

Note. 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.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, "Tracking Employee Competencies and Accomplishments"

CHAPTER 10

Tracking Training Costs

This chapter provides an overview of tracking training costs and tells you how to:

- Define and track reimbursable tuition expenses.
- Calculate and track student costs.
- Update actual training costs.
- Review training costs.
- (FRA) Review French employee session costs.

Understanding Training Cost Tracking

If your organization reimburses employees for training-related expenses, you can use PeopleSoft Human Resources to handle student reimbursements for external course expenses. The system calculates reimbursable amounts according to the schedules that you create. In the Budget Training business process, you run processes that update your organization's training costs (as students complete courses and are reimbursed for training expenses) and posts those costs against your organization's training budget.

Common Elements Used in This Chapter

Data Override and **Override** — Select this check box to make cost fields available for entry to manually change costs that are associated with a student for a specific course session.

Note. Once you make changes to the default values on a page, you cannot select the **Data Override** check box again.

Warning! When you rerun the Compute Student Cost process with this check box selected on a page, the system overwrites the data on that page with new calculation results.

EE Qty (employee quantity) — Defines how many units of equipment or materials or how many units of the Expense Type value on the page that the employee used as part of the course session.

Per Employee Cost	Displays the costs per employee. The appropriate currency is defined in the field next to this field. You can override the costs by selecting the **Data Override** check box.
Run	Click this button to run the request. PeopleSoft Process Scheduler runs the process at user-defined intervals.

(FRA) France

For French companies only, define the additional facility information that is used to generate the French Training Report 2483.

Financed Cost	Enter this cost if the student's training is 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's training costs.

Defining and Tracking Reimbursable Tuition Expenses

This section describes how to:

- Define reimbursable expenses and percentages.
- Track student reimbursements.

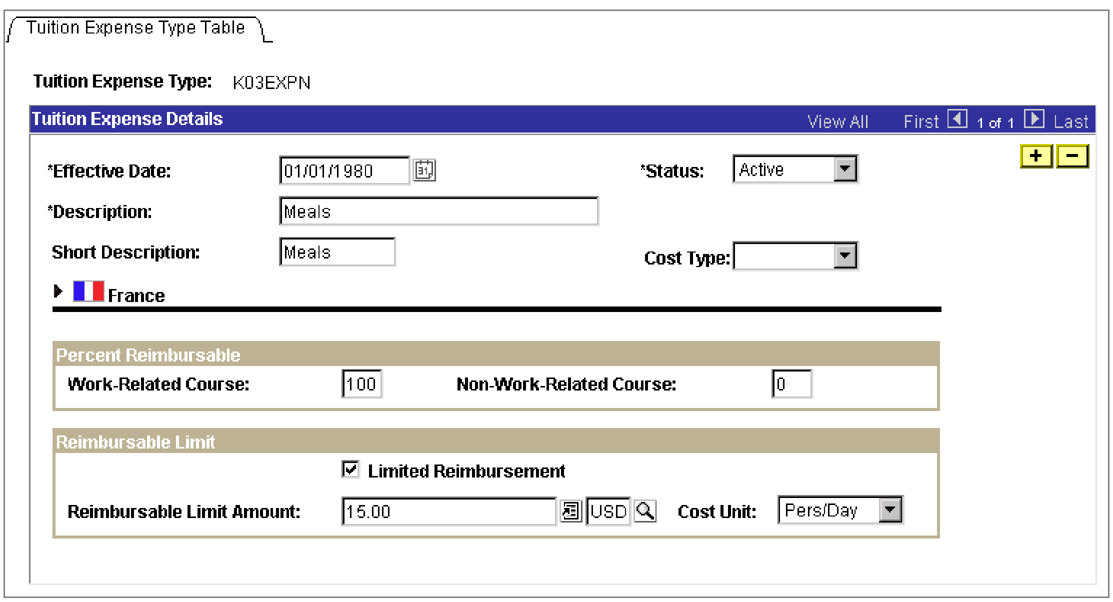
Note. The reimbursement information that you track here is for informational purposes only and does not impact payroll processing in the PeopleSoft Human Resources Management System (HRMS).

Pages Used to Define and Track Reimbursable Expenses

Page Name	*Object Name*	*Navigation*	*Usage*
Tuition Expense Type Table	TRN_EXPNS_TYP_GBL	Develop Workforce, Administer Training (GBL), Setup, Tuition Expense Type Table, Tuition Expense Type Table Develop Workforce, Budget Training (GBL), Setup, Tuition Expense Type Table, Tuition Expense Type Table	Define the types of training expenses that are reimbursable, define the percentage that is reimbursable, and set up a reimbursable limit.
Tuition Reimbursement	TRN_TUITION_REIMB	Develop Workforce, Administer Training (GBL), Use, Tuition Reimbursement, Tuition Reimbursement	Track expenses that are reimbursed to students.

Defining Reimbursements and Percentages

Access the Tuition Expense Type Table page.



Tuition Expense Type Table page

Cost Type	Select ***Direct*** or ***Indirect.***

(FRA) France

For French companies, 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 type that indicates the expense type. Options are ***Equipment, Furniture, Instructor, Lodging,*** and ***Non-Instruct*** (non-instructor-related expenses).
Chargeable	Select if the amounts for this expense type are chargeable and can be reported on the 2483 report.
Limited Amount	Select if the expense amount is restricted to a specific value. The system makes the **Limit Amount** and **Cost Unit** fields available for entry.
Limit Amount and **Cost Unit**	Enter the limit amount in this field and select the associated unit in the **Cost Unit** field. For example, 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.

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

In this group box, you define reimbursable limits to help track tuition reimbursement costs.

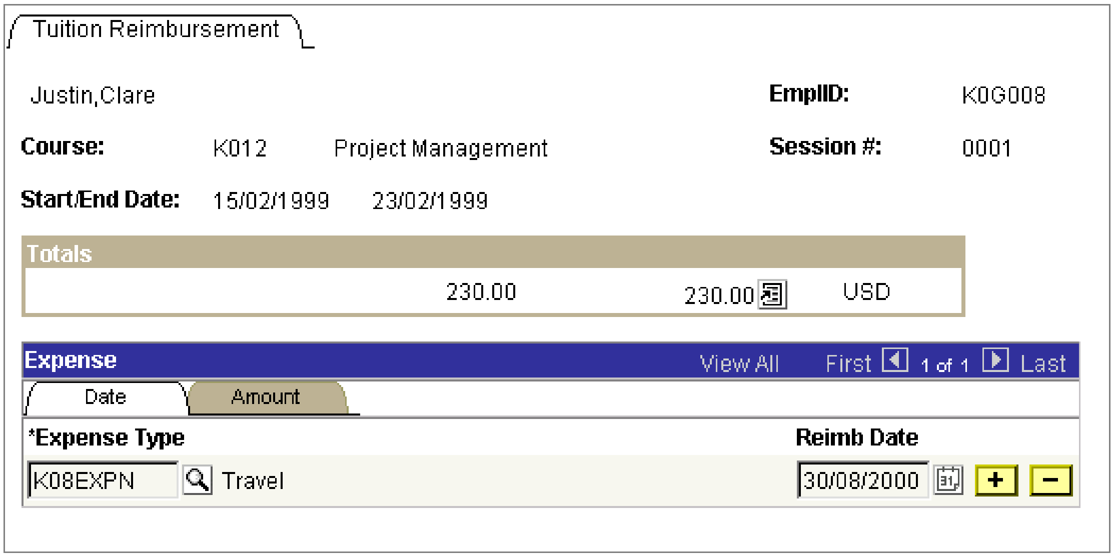
Limited Reimbursement	Select to limit the amount that the students are reimbursed. The system makes the **Reimbursable Limit Amount** and **Cost Unit** fields available for entry.
Reimbursable Limit Amount and **Cost Unit**	Enter the reimbursable limit in this field and select the associated unit in the **Cost Unit** field. For example, you can specify a flat cost, such as USD 100, or limit the amount that is reimbursed for a period, such as USD 100, per person, per year.

See Also

"Producing the French Training Report 2483"

Tracking Student Reimbursements

Access the Tuition Reimbursement page.



Tuition Reimbursement page: Date tab

You can track all expense types for which you usually reimburse students, including tuition, textbooks, and ancillary materials.

You can enter and update tuition reimbursements only for courses where students have a status of *Enrolled, Currently Attending,* or *Completed.* You update (or the system updates) the student status in Course Session Enrollment and Student Training.

Totals

This group box displays the sum of the amounts in the Expense Amount field, the sum of Amount Reimbursed, and the currency code from the Amount tab.

Date Tab

Expense Type — Select an expense type from the expense types that you created on the Tuition Expense Type Table page.

Reimb Date (reimbursement date) — Enter a reimbursement date.

Amount Tab

Expense Amount — Enter the expense amount.

Work LTD (work-related) — Select if the course is work-related.

The system calculates the amount that is to be reimbursed to the student, based on the percentages that you entered on the Tuition Expense Type Table. You can set up different percentages for work-related and nonwork-related courses. If you have set a reimbursable limit on the Tuition Expense Type table, when you select this check box, the system calculates the amount that is to be reimbursed. If the limit is exceeded, the system displays a warning message and adjusts the **Amount Reimbursed** value.

Amount Reimbursed The system calculates the amount that is to be 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 to see whether the limit has been exceeded. If the limit is exceeded, the system displays a warning message and reduces the **Amount Reimbursed** value according to the limit that you have set. You can continue with the reduced amount or update the amount reimbursed.

See Also

Setting Up the Training Cost Currency

Calculating and Tracking Student Costs

To calculate student costs for a course session, run the Compute Student Costs process (RUNCTL_TRN013). This process splits out the training costs to the employee level using cost information that is specified at the course, course catalog, and course session levels.

Once you've run this process, you can view the results in the Track Student Cost component. Adjustments that you make to the cost information in that component override the cost information that is calculated by the process.

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:

Cost Component	***Table***
Salary	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

This section describes how to:

- Run the Compute Student Cost process.
- Track salary costs.
- Track vendor costs.

- Track facility costs.
- Track equipment costs.
- Track instructor costs.
- Track employee expenses.
- Track session expenses.

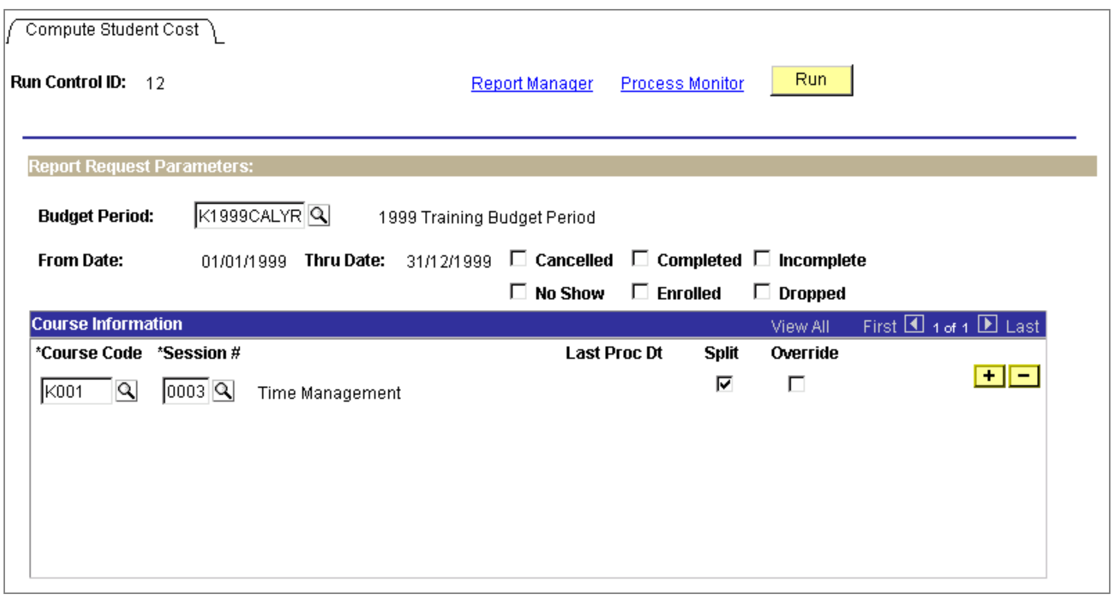
Pages Used to Calculate and Track Student Costs

Page Name	***Object Name***	***Navigation***	***Usage***
Compute Student Costs	RUNCTL_TRN013	Develop Workforce, Administer Training (GBL), Process, Compute Student Cost, Compute Student Cost	Use the Compute Student Costs page to run the Compute Student Costs process. You run this process before you review or update your actual training costs at the employee level. This process computes student costs by budget period for the course sessions that you specify as part of your process parameters.
Track Student Costs - Salary	TRN_EE_SESSN_CST1	Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Salary	Review the employee salary costs that are associated with a course session and budget period.
Track Student Costs - Vendor	TRN_EE_SESSN_CST3	Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Vendor	Review and update the vendor costs resulting from the Compute Student Cost process.
Track Student Costs - Facility	TRN_EE_SESSN_CST5	Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Facility	Review and update the facility costs resulting from the Compute Student Cost process.
Track Student Costs - Equipment	TRN_EE_SESSN_CST7	Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Equipment	Review and update training equipment and materials costs resulting from the Compute Student Cost process.

Page Name	Object Name	Navigation	Usage
Track Student Costs - Instructor	TRN_EE_SESSN_CS T4	Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Instructor	Review and update the training instructor costs that resulted from the Compute Student Cost process.
Track Student Costs - Employee Expense	TRN_EE_SESSN_CS T2	Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Employee Expense	Update the employee expense costs resulting from the Compute Student Cost process.
Track Student Costs - Session Expense	TRN_EE_SESSN_CS T6	Develop Workforce, Administer Training (GBL), Use, Track Student Costs, Session Expense	Update the expense costs resulting from the Compute Student Cost process.

Running the Compute Student Costs Process

Access the Compute Student Costs page.



Compute Student Cost page

Budget Period — Select from the list of values.

From Date and **Thru Date** — When you select a budget period, the **From Date** and **Thru Date** appear by default from the Budget Period Table page.

Cancelled, Completed, Incomplete, No Show, Enrolled, and **Dropped**	Select to include students who are associated with the specified courses and course sessions and have an attendance status of ***Cancelled*, *Completed*, *Incomplete*, *No Show*,** *or* ***Enrolled*,** respectively.

Course Information

Course Code	Select from the list of course codes. The system displays only courses that have completed sessions for the selected budget period.
Session # (session number)	Select from the list of completed sessions.
Last Proc Dt (last process date)	System displays the date that you last ran the Compute Student Cost process for the specified course session and budget.
Split	Select to proceed with the process and populate the Track Student Cost pages with the process calculation results.
Override	By default, the process does not alter costs entered manually into the Track Student Costs page with the Data Override flag. To force the process to store computed costs into the Employee Training Cost component, use this Override flag.

See Also

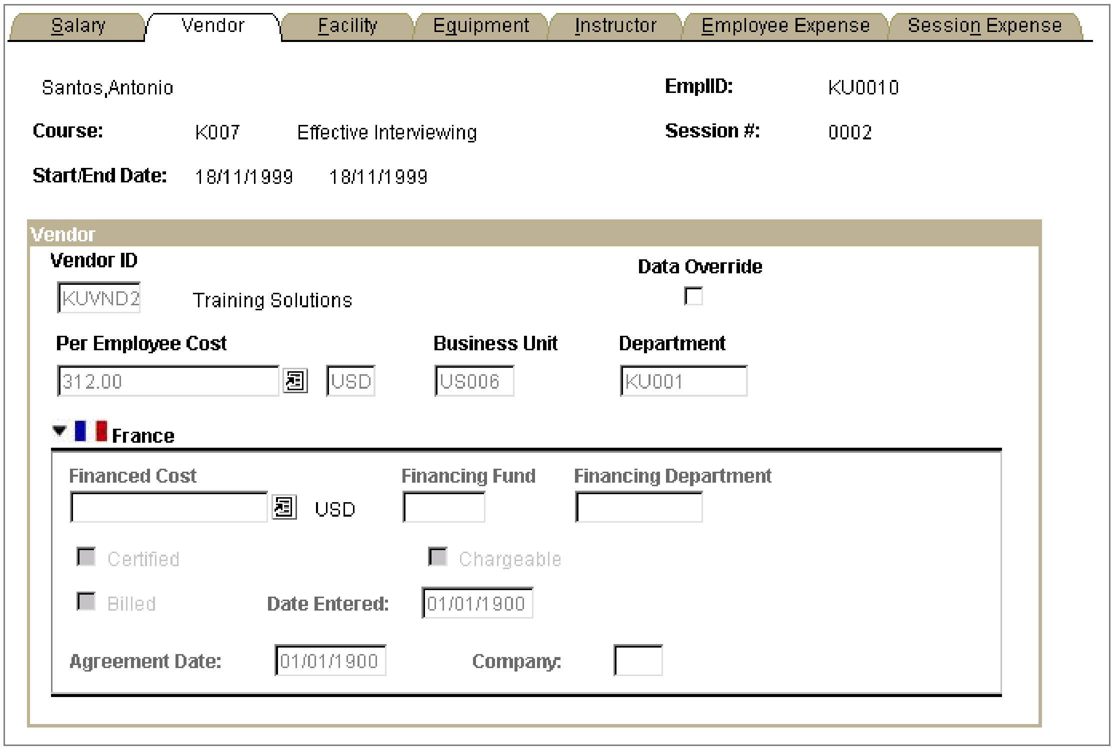
"Setting Up Training Costs"

"Defining Training Requirements"

PeopleTools PeopleBook: Process Scheduler

Reviewing and Updating Vendor Costs

Access the Track Student Costs - Vendor page.



Track Student Costs - Vendor page

(FRA) France

For French companies only, define the additional vendor information to be tracked for legal reporting

Certified, Billed, and **Chargeable**	For legal reports, select any check box that is applicable.
Date Entered	Enter date that the invoice was entered for the vendor.
Agreement Date and **Company**	Enter the agreement date and the name of the company that signed the agreement.

See Also

"Setting Up Training Costs," Setting Up the Training Cost Currency

"(FRA) Producing the French Training Report 2483"

Updating Actual Training Costs

Now you can run the Update Planned and Real Costs process that updates the actual training costs that you're tracking in the Administer Training business process. You can post these costs against your organization's training budget in the Budget Training business process.

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 the 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.

This section describes how to run the Update Planned and Real Cost process.

Note. Run this process only if you have set up a training budget using the Budget Training business process, and have been tracking actual training costs in the Administer Training business process.

Page Used to Run the Update Planned and Real Cost Process

Page Name	*Object Name*	*Navigation*	*Usage*
Update Planned and Real Costs	RUNCTL_TRN012	Develop Workforce, Administer Training (GBL), Process, Update Planned and Real Cost, Update Planned and Real Cost	Run the Update Planned and Real Cost process.

Running the Update Planned and Real Cost Process

Access the Update Planned and Real Costs page.

Update Planned and Real Costs page

Budget Period Select a budget period.

You can update costs for any predefined budget period, but you'll want to run the process only against the current budget period because you 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.

Note. The budget period needs to be frozen for the process to execute properly.

Base Currency

When you move out of the **Business Unit** field, the system displays the base currency that you defined for that business unit. When the system calculates the costs for this budget period and business unit, it converts the costs to the base currency shown here. Then you can compare your training expenditures and budget amounts in the same currency.

When the system executes the Update Planned and Real Costs process, it calculates totals for all cost elements for each training demand that is associated with the selected budget period and business unit and compares the totals to the total training budget.

See Also

PeopleTools PeopleBook: Process Scheduler

"Planning Training Budgets for Your Organization," Creating Global Scenarios

Reviewing Training Costs

This section describes how to:

- Review training costs.
- Review nonbudgeted training costs to date.
- Compare budgeted costs to actual costs.

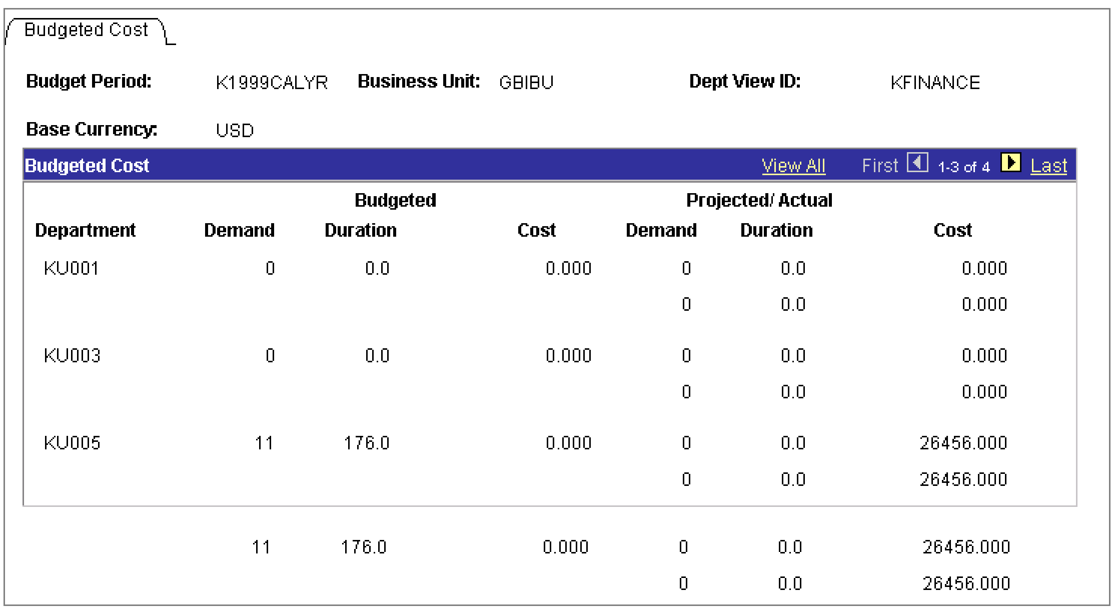
Pages Used to Review Training Costs

Page Name	*Object Name*	*Navigation*	*Usage*
Budgeted Costs	TRN_BDGT_ACT_COST	Develop Workforce, Administer Training (GBL), Inquire, Budgeted Cost, Budgeted Cost	Review your budgeted costs compared to your actual training costs to date.

Page Name	*Object Name*	*Navigation*	*Usage*
Unbudgeted Cost	TRN_NOTBDGT_COST	Develop Workforce, Administer Training (GBL), Inquire, Unbudgeted Cost, Unbudgeted Cost	Review your unbudgeted training costs to date. Costs can include your projected costs without any actual expenditure, if you have not spent the projected amount.
Summary Cost	TRN_CMPSUMMRY_COST	Develop Workforce, Administer Training (GBL), Inquire, Summary Cost, Summary Cost	View the compared budgeted and actual training cost totals for your organization.

Reviewing Training Costs

Access the Budgeted Costs page.



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

	Budgeted			Projected/ Actual		
Department	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

Note. 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.

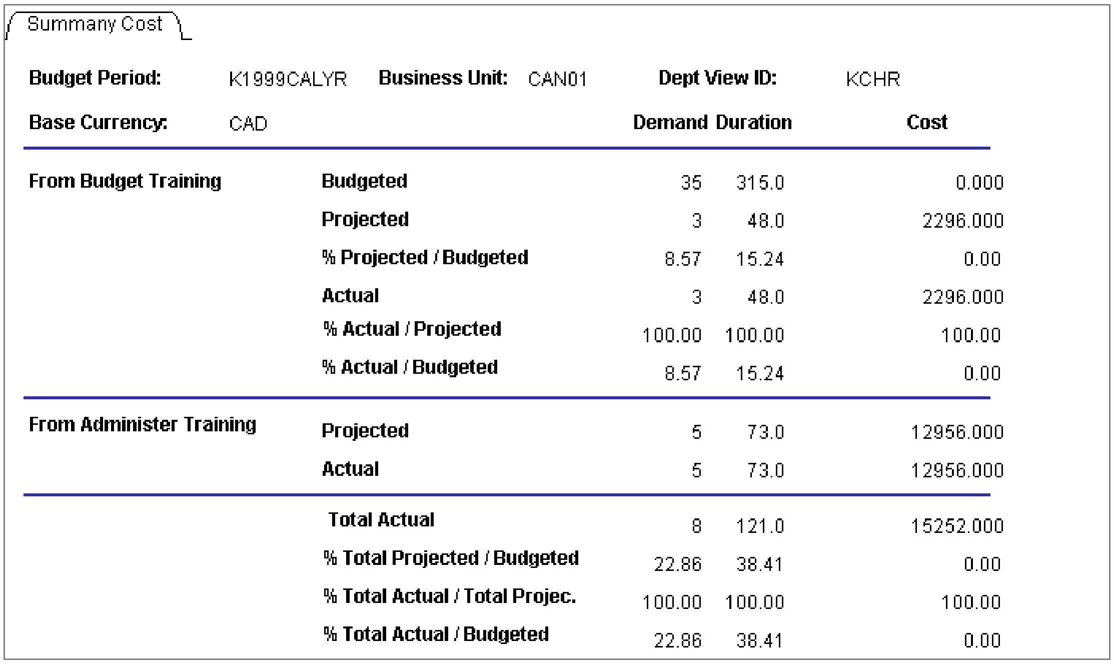
See Also

"Planning Training Budgets for Your Organization," Tracking Your Training Plan

"Setting Up Training Costs," Setting Up Default Training Costs and Setting Up the Training Cost Currency

Comparing Budgeted Costs to Actual Costs.

Access the Summary Cost page


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	0.000
	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

From Budget Training

Note. These results include all the demands that you budgeted for in the Budget Training business process.

For all of your budgeted training costs for the specified **Budget Period, Business Unit,** and departments in the **Dept View ID** (departmental view ID), the system provides 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 enrolled 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 *Completed*).

Category	**Demand**	**Duration**	**Cost**
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 that 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.
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

Note. These amounts 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 business process, but not linked to a budget training demand.

The amounts that the system displays detail the training costs (captured in the Administer Training business process) that are based on training expenses that are associated with training employees who are not included in the budget process.

Category	**Demand**	**Duration**	**Cost**
Projected	Projected (current realized) training Demand (number of employees that are enrolled 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 *Completed*).

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 *Completed*).

Total Actual Costs

Note. These amounts represent a summary of the actual costs that are incurred as part of the training budget (budgeted amounts) and from unbudgeted costs that are tracked in the Administer Training business process.

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 the total budgeted Cost that the projected Cost represents. The projected amounts here include students who have been enrolled in the course sessions for that budget period but have not yet completed the course (Attendance Status is other than *Completed*).
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 *Completed*).
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.

(FRA) Reviewing French Employee Session Costs

If you're administering training programs for French workers, use the EE Session Cost Summary (employee session cost summary) 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.

Use this inquiry page only after you've run the FRA Compute 2483 process and reviewed and/or updated the employee's cost information on the Track Student Cost component.

This section describes how to view a summary of the course session costs for an employee.

See Also

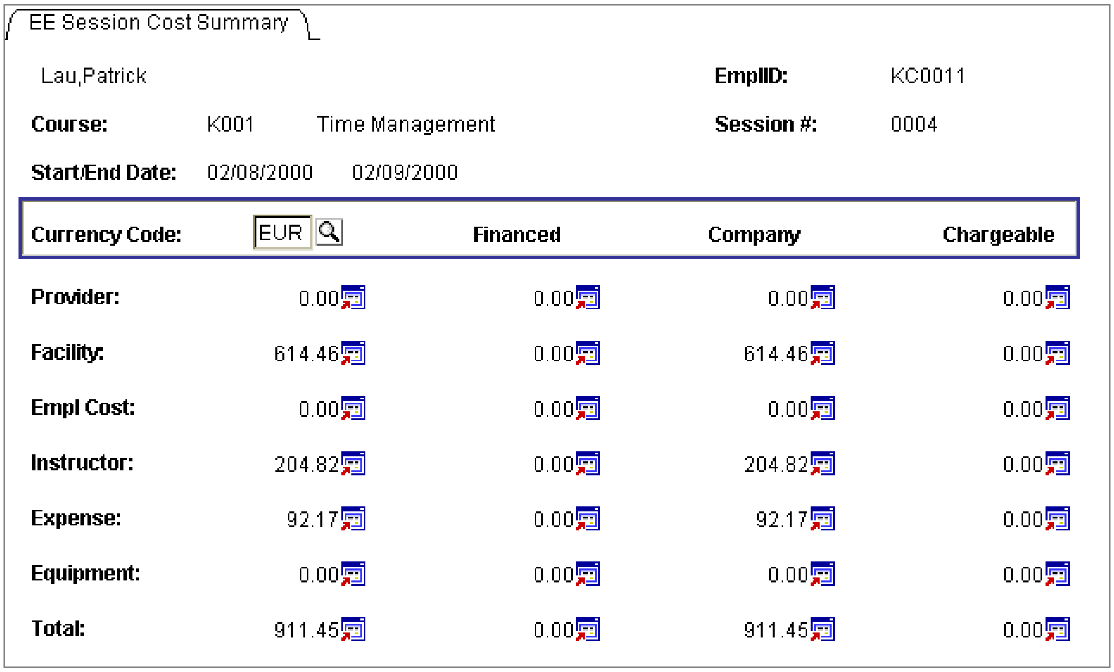
"Producing the French Training Report 2483"

Page Used to View a Summary of Employee Course Session Costs

Page Name	***Object Name***	***Navigation***	***Usage***
EE Session Cost Summary	TRN_EE_SMR_COST1	Develop Workforce, Administer Training (GBL), Inq Lcl, FRA Student Ssn Cost Summary, EE Session Cost Summary	View a summary of course session cost information for an employee. **Note.** This page is relevant to French organizations only.

Viewing Employee Course Session Costs

Access the EE Session Cost Summary page.


EE Session Cost Summary

Lau,Patrick **EmplID:** KC0011

Course: K001 Time Management **Session #:** 0004

Start/End Date: 02/08/2000 02/09/2000

Currency Code: EUR		**Financed**	**Company**	**Chargeable**
Provider:	0.00	0.00	0.00	0.00
Facility:	614.46	0.00	614.46	0.00
Empl Cost:	0.00	0.00	0.00	0.00
Instructor:	204.82	0.00	204.82	0.00
Expense:	92.17	0.00	92.17	0.00
Equipment:	0.00	0.00	0.00	0.00
Total:	911.45	0.00	911.45	0.00

EE Session Cost Summary page

For each cost that is categorized as a **Provider**, **Facility, Employee Cost, Instructor, Expense,** or **Equipment** amount in the France group boxes on the Track Student Cost page on the Administer Training (GBL) menu, the system displays that cost for the session indicated.

For each charge, the system displays:

- 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.
- The total chargeable amount for the training category. Company costs are calculated as follows:

Company Costs = Total Costs – Financed Costs.

Note. The **Chargeable** amount is based on any charges for French workers that you indicated as chargeable on the cost pages in the Administer Training business process. Chargeable costs are also reflected in the company-contributed/financed amount, as indicated in 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.

See Also

"Producing the French Training Report 2483"

"Setting Up Training Costs," Setting Up the Training Cost Currency

C H A P T E R 1 1

(GER) Tracking Professional Educational Programs for German Employees

This chapter provides an overview of German professional, educational, training programs and tells you how to how to set up those programs for German employees.

Understanding German Internal Educational Training Programs

Companies in Germany can have their employees follow company-provided, professional, educational training programs. Companies that offer these programs can track the steps and status of employees as they work toward their degrees. The programs are called German Internal Education Training Programs.

The German Internal Education Training Programs feature enables you to set up an education plan, associate the plan with an employee, and track the employee's progress.

To set up and monitor a German internal education training program:

1. Identify the steps that make up the education plan.
2. Group the steps to create a training plan.
3. Enter information about the employee or track the employee's progress**.**

Identifying Steps, Grouping Steps, and Tracking Employee Progress

This section describes how to:

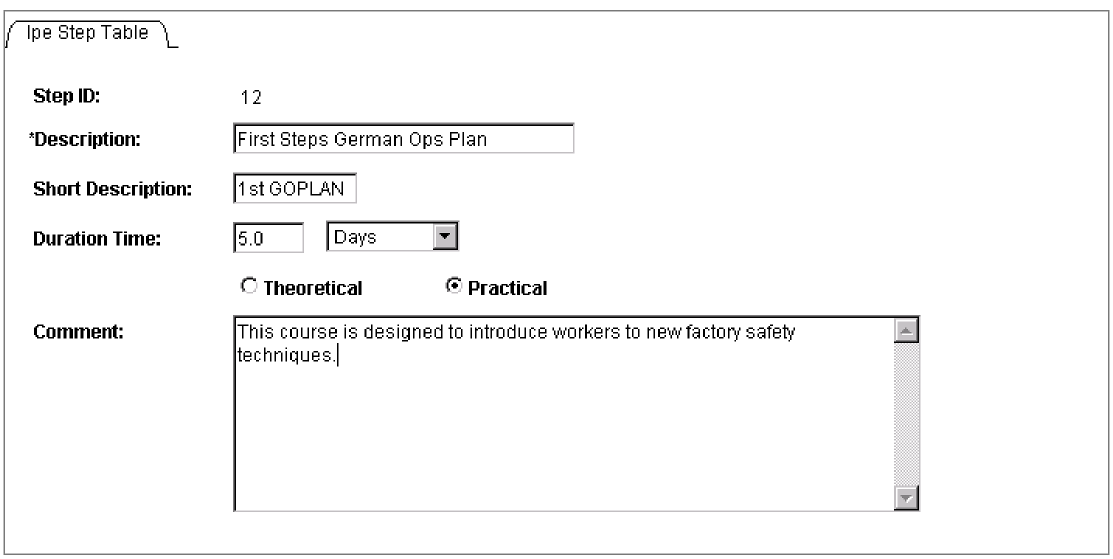
- Identify the steps that make up an educational training program.
- Group the steps into a training plan.
- Track the progress of German employees who are participating in the training plan.

Pages Used to Identify Steps, Group Steps, and Track Employee's Progress

Page Name	*Object Name*	*Navigation*	*Usage*
GER Steps Table - Ipe Step Table (German steps table - internal professional education step table)	IPE_STEP_TABLE	Develop Workforce, Administer Training (GBL), Setup Lcl, GER Steps Table, Ipe Step Table	Identify the steps that make up an educational training program.
Ipe Plan Table	IPE_PLAN_TABLE	Develop Workforce, Administer Training (GBL), Setup Lcl, GER Plan Table, Ipe Plan Table	Group the steps into a training plan.
Internal Profes. Education (internal professional education)	EE_IPE_PLAN	Develop Workforce, Administer Training (GBL), Use Lcl, GER Internal Education, Internal Profes. Education	Track the progress of German employees who are participating in the training plan.

Identifying the Steps for a Training Plan

Access the GER Steps Table - Ipe Step Table page.



GER Steps Table - Ipe Step Table page

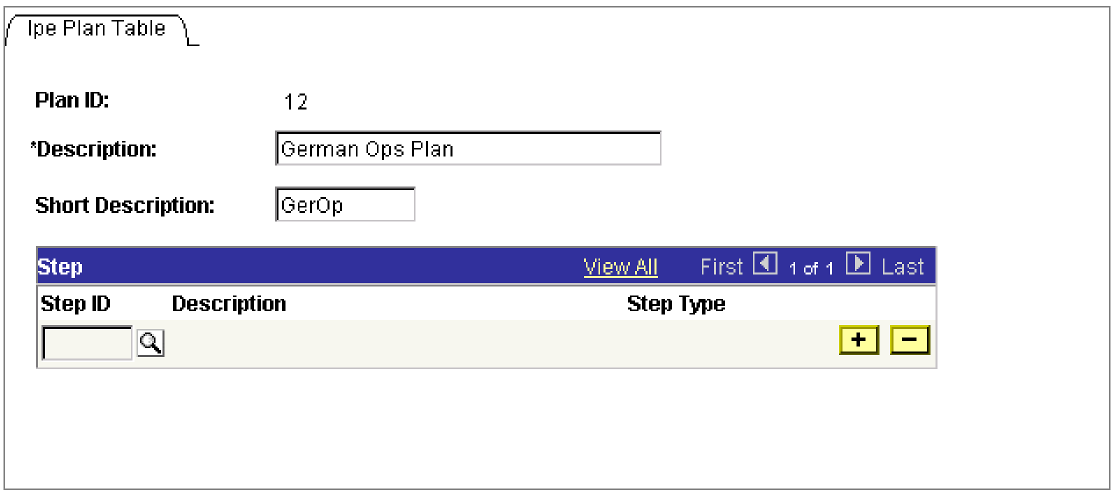
Duration Time Enter or update the numeric duration time of the step, and select the type of measurement: ***Days, Hours, Months, Weeks,*** or ***(none).***

The duration time that you enter isn't related to your Budget Training duration units. These pages don't affect your training cost calculations in the Budget Training module or Administer Training module.

Theoretical/Practical Select whether the course is **Theoretical** or **Practical.** These categories are used by German organizations for training reporting purposes.

Grouping the Steps Into a Training Plan

Access the GER Plan Table - Ipe Plan Table page

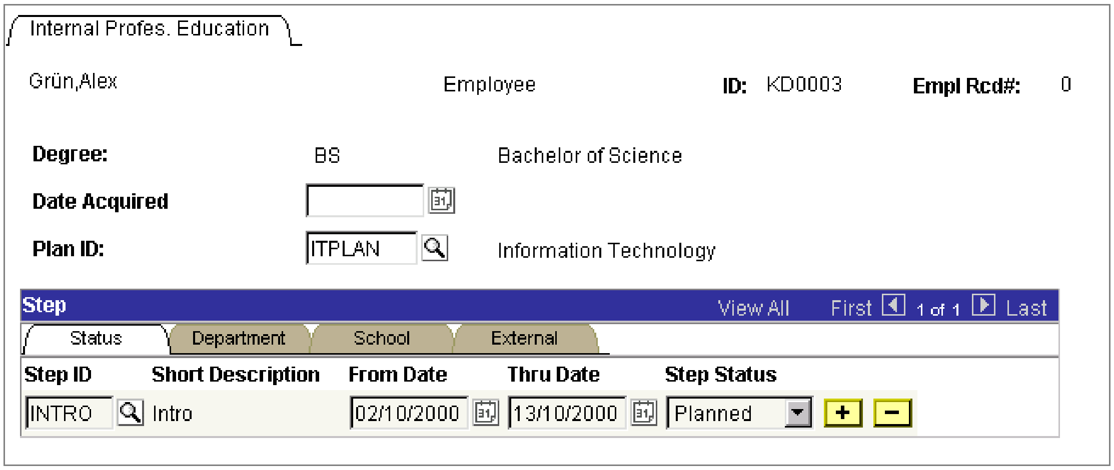


GER Plan Table - Ipe Plan Table page

Step ID Add or delete the steps that make up this plan. When you add a step, the system displays information about the step.

Tracking Employees' Progress

Access the Internal Profes. Education page.



Internal Profes. Education page: Status tab

Enter the employee's educational background information on the Education - Professional Ed. (Education) and Training page to record additional educational information for German employees.

You can also track an employee's progress by printing the German Internal Professional Education Status report.

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

Common Page Information

Degree — The system displays the degree that applies to this training plan.

Date Acquired — Enter the date that the employee acquired the degree.

Plan ID — Select a plan ID from the list of values.

When you move out of this field, the system displays the plan description and populates the Plan Step table on the page with any step IDs that are associated with this plan.

Step — The system displays the step IDs that are associated with the plan that you selected in the **Plan ID** field. You can update the step ID, business unit, and department default values for the **Plan ID** on this page. You can also add step IDs that are not associated with the **Plan ID,** to reflect any variations in the employee's training plan.

Status Tab

From Date and **Thru Date** — Enter the start and end dates that the employee starts and finishes the step.

Step Status — Select from the list of options.

CHAPTER 12

(FRA) Producing the French Training Report 2483

This chapter provides an overview of the French Training Report 2483 process and tells you how to:

- Review the setup for groups and indicators.
- Enter additional report parameters.
- Run the report process and review the results.
- Run the report.

Understanding the French Training Report 2483 Process

The Training Report 2483 (TRN029), also called the Declaration 2483 Report, is a French regulatory report that is used to declare the vocational training that your company has provided to your employees. This report compiles information about the amount of money that your company spends on training.

The report provides details for ten groups of information that are defined by the French government. PeopleSoft delivers the groups as system data in PeopleSoft Human Resources.

Note. Any changes that you make to these groups directly affect the way that the system generates your French Training Report 2483. Therefore, you should make changes only in response to changes in the French regulatory reporting requirements.

You use PeopleSoft Application Engine in your PeopleSoft Human Resources system to calculate and compile the information for the training report.

Here is an overview of how 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 indicators.

5. (Optional) Review and edit the results of the process calculations.
6. Run the Training Report 2483 (TRN029) to print (or export to a file) the results of the process calculations.

See Also

PeopleSoft Human Resources PeopleBook: Meet Regulatory Requirements," Meeting Regulatory Requirements for France"

PeopleTools PeopleBook: Application Engine

Common Elements Used in This Chapter

Description	In the second **Description** field, enter comments that provide additional information about the group or indicator. These comments won't affect your training reporting.
Number of Columns	Review the number of columns for the group or indicator. The number of columns that you specify affects the number of columns that the system displays for the group or indicator. If you change the number of columns and move out of this field, the **Number of Columns** description fields (for example, **Descr. 1**) are changed automatically.

Reviewing Setups for Groups and Indicators

This section describes how to:

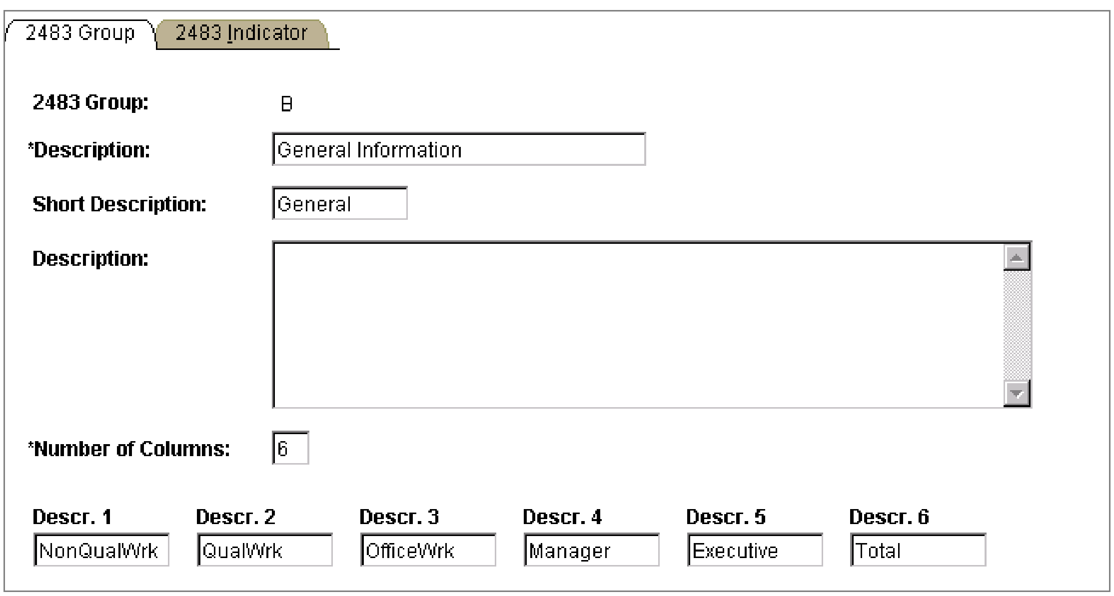
- Review the group setup.
- Review the indicator setup.

Pages Used to Review Training Report Groups and Indicators

Page Name	***Object Name***	***Navigation***	***Usage***
FRA 2483 Table - 2483 Group	GROUP_2483_TBL_FRA	Develop Workforce, Administer Training (GBL), Setup Lcl, FRA 2483 Table, 2483 Group Monitor Workplace, Report Regulations (FRA), Setup, 2483 Table, 2483 Group	Review the group setup for your French Training Report 2483.
FRA 2483 Table - 2483 Indicator	INDIC_2483_TBL_FRA	Develop Workforce, Administer Training (GBL), Setup Lcl, FRA 2483 Table, 2483 Indicator Monitor Workplace, Report Regulations (FRA), Setup, 2483 Table, 2483 Indicator	Review the indicator setup for your French Training Report 2483 groups.

Reviewing the Group Setup

Access the FRA 2483 Table - 2483 Group page.



FRA 2483 Table - 2483 Group page

The following groups (used in the **2483 Group** field) are delivered with PeopleSoft Human Resources:

Group ID	**Description**
B	General Information
C	Costs Summary
E	Training Levy Credit
F	Company Cost
G	Financing Sandwich Course
H	Finance Training Leave
J	Finance Training Leave Limited
L	Distribution by Category
M	Distribution by Gender and Age

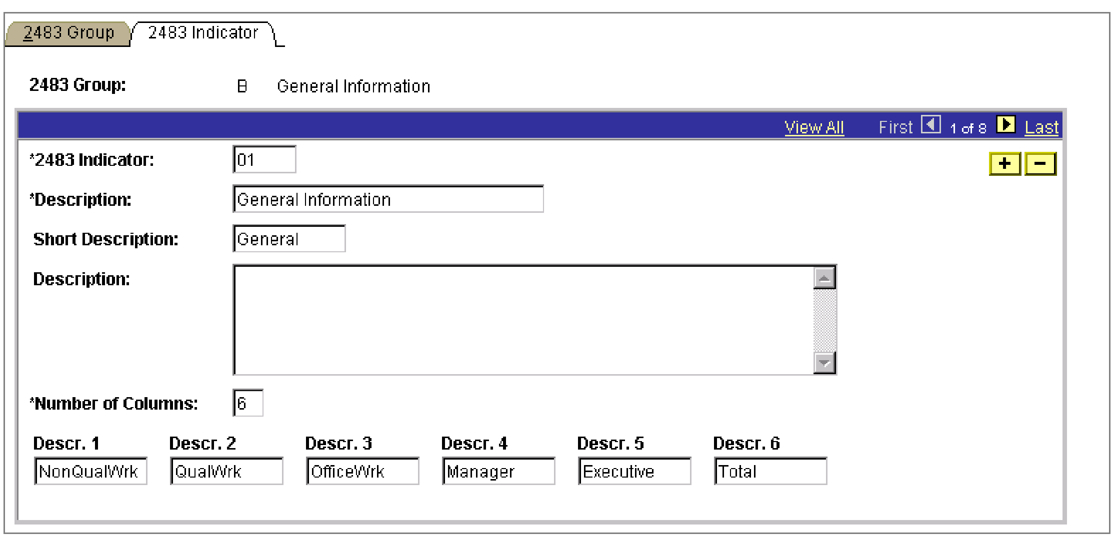
When you enter a new indicator for a group, the number of columns and the descriptions on this page are used as default values on the FRA 2483 Table - 2483 Indicator page.

See Also

PeopleTools PeopleBook: Reporting Tools

Reviewing the Indicator Setup

Access the FRA 2483 Table - 2483 Indicator page.



FRA 2483 Table - 2483 Indicator page

The system displays the **2483 Group** that is associated with the indicators on this page.

PeopleSoft provides the appropriate labels for each column. The report prints **Descr 1, Descr 2,** and so forth as the indicator labels on the French Training Report.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Appendix: PeopleSoft Application Fundamentals for HRMS Reports“

Entering Additional Report Parameters

The 2483 report requires additional parameters that are not stored in PeopleSoft Human Resources. Before you run the report, you must enter these parameters into the system.

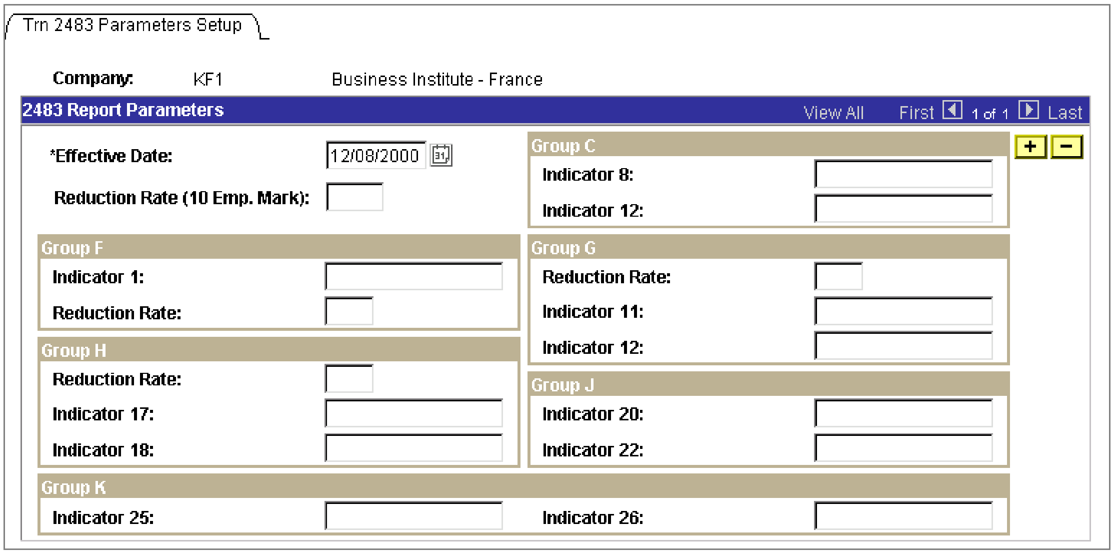
This section describes how to enter additional report parameters.

Page Used to Enter Additional Report Parameters

Page Name	*Object Name*	*Navigation*	*Usage*
Trn 2483 Parameters Setup (training 2483 parameters setup)	TRN_2483_PARM	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	Enter additional parameters that are required for your 2483 report.

Entering Additional Parameters

Access the Trn 2483 Parameters page.



Trn 2483 Parameters Setup page

Reduction Rate (10 Emp. Mark) (reduction rate [10 employee mark]) — If your organization is entitled to a reduction, based on the number of employees who have been employed over the previous 7 years, enter the percentage.

Group C

Indicator 8 — Enter the amount that is paid to a registered body for training.

Indicator 12 — Enter the amount of other payments that are related to training.

Group F

Indicator 1 — Enter the total of the annual salaries for your organization.

Reduction Rate — The total annual salaries and the type of organization determine the amount that an organization must spend on vocational training. 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 that is paid to a registered body for sandwich training courses.

Indicator 12 — Enter the amount that is 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 that is paid to a registered body for the Capital Temps Formation. In this scheme, employers' payments are converted to the number of hours of training that an employee is entitled to take.
Indicator 18	Enter the amount that is 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 that is 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.
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.

Running the Report Process and Reviewing the Results

This section describes how to:

- Run the Compute Training Report process.
- Review and edit the results of the process

Pages Used to Run the Compute Training Report Process and Review the Results

Page Name	***Object Name***	***Navigation***	***Usage***
FRA Compute 2483 - Declaration 2483	RUNCTL_DEC2483	Develop Workforce, Administer Training (GBL), Proc Lcl, FRA Compute 2483, Declaration 2483 Monitor Workplace, Report Regulations (FRA), Process, Compute Training Report 2483, Declaration 2483	Run the Compute Training Report 2483 (DEC2483) process.
FRA Edit 2483 - Edit 2483	EDIT_2483_FRA	Develop Workforce, Administer Training (GBL), Use Lcl, FRA Edit 2483, Edit 2483 Monitor Workplace, Report Regulations (FRA), Use, Edit 2483, Edit 2483	Review and edit the results of the calculations that are run by the Compute Training Report process on each of your indicators.

Running the Compute Training Report Process

Access the FRA Compute 2483 - Declaration 2483 page.

FRA Compute 2483 - Declaration 2483 page

Run this process once you have entered all of the Training Report group and indicator information into your PeopleSoft Human Resources system.

Company	Select the company that is to run the French Training Report 2483.

Calendar Year Enter the calendar year that the system is to use to determine cost information for that report.

Creation Date Enter the creation date for the report.

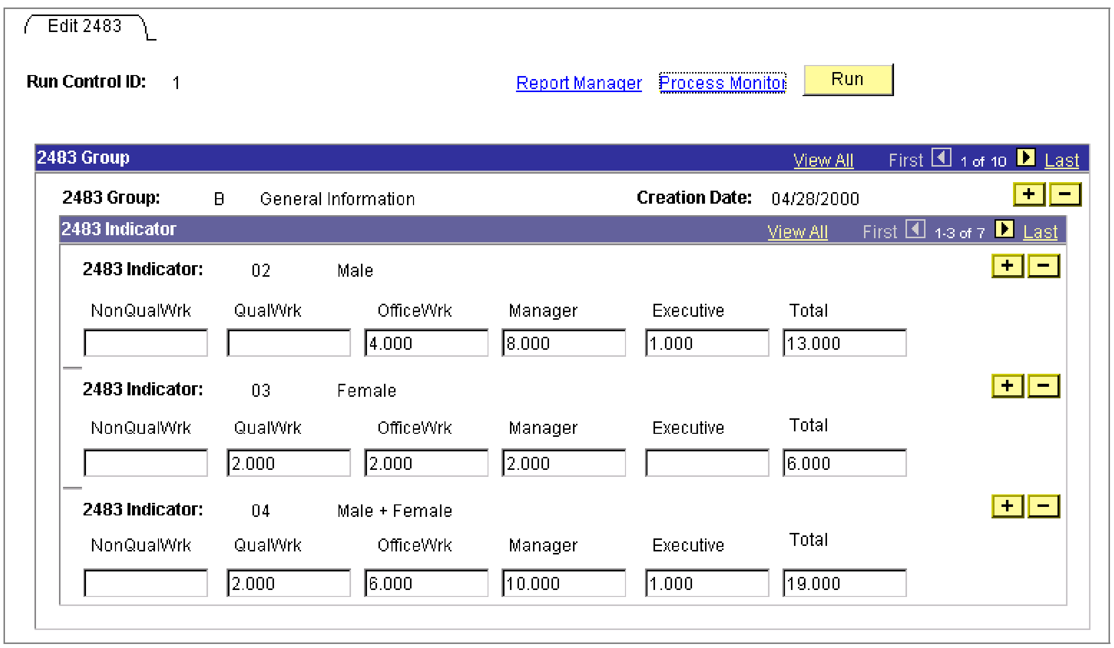
See Also

PeopleTools PeopleBook: Application Engine

PeopleTools PeopleBook: Process Scheduler

Reviewing and Editing the Results of the Process

Access the FRA Edit 2483 - Edit 2483 page.



FRA Edit 2483 - Edit 2483 page

You can edit any amounts on this page.

Some indicators cannot be calculated. For those indicators, compile the information manually and use this page to enter it into the system.

Note. If you rerun the Declaration 2483 process after making edits to the amounts on this page, the system overwrites the edits that you made to the Declaration 2483 results prior to rerunning the Declaration 2483 process.

See Also

Entering Additional Report Parameters

Running the French Training Report 2483

When you are satisfied with the results of the Compute Training Report process, run the actual report on the Report Training 2483 page. The indicators that are required by the French government are calculated by PeopleSoft Human Resources and tabulated in this Crystal report.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Appendix: PeopleSoft Application Fundamentals for HRMS Reports," Administer Training Reports

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