



PeopleSoft Human Resources
PeopleBook: Track Global
Assignments

PeopleSoft Human Resources PeopleBook: Track Global Assignments

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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 <i>Active</i> or <i>Inactive</i> .
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.

Person Name	
Last:	津村
First:	友則
Alternate Character Name:	ツムラトモノ
Name:	津村 友則

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

Comp Rate Code: TSDFLT

Description: Salaried Default

Base Pay **Use Highest Rate**

Default Without Override

Rate Code Type: Flat Amount

Rate Code Class:

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							First	1 of 1	Last
Amounts		Changes		Conversion					
*Rate Code	Seq	Manually Updated	Change Amount	Change Points	Change Percent				
1	0	<input type="checkbox"/>	0.000000		0.000	<input type="button" value="+"/>	<input type="button" value="-"/>		

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							First	1 of 1	Last
Amounts		Changes		Conversion					
*Rate Code	Seq	Source	Default Without Override	Apply FTE	Converted Comp Rate				
1		None	<input type="checkbox"/>	<input type="checkbox"/>		<input style="background-color: yellow;" type="button" value="+"/>	<input style="background-color: yellow;" type="button" value="-"/>		

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 <i>Absorbing Premium</i> , <i>Seniority Pay</i> , <i>Job Code</i> , or <i>Manual</i> .
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.

*Description:	<input type="text" value="This is a required field"/>
----------------------	---

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).
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. When we cite a field value under the page on which it appears we use this style: <i>field value</i> . We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
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.

<i>Page</i>	<i>System Name</i>	<i>Navigation</i>	<i>Usage</i>
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: Track Global Assignments

This book provides you with the information you will need for implementing and using PeopleSoft Human Resources: Track Global Assignments.

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

Setting Up Basic Assignment Information

This chapter provides an overview of basic assignment information and tells you how to:

- Process employees for a global assignment.
- Define global assignment types.
- Identify reasons for assignments.
- Create checklists.
- Define deductions and earnings for assignment compensation.
- Classify types of company-paid travel.
- Enter educational qualifications and skills.

Understanding Global Assignments

If your organization has operations in more than one country, you process large amounts of information about employees as they move from project to project. International moves require such things as passport and visa tracking and relocation packages. PeopleSoft Human Resources enables you to ensure smooth transitions for employees on global assignments.

Types of Global Assignments

With PeopleSoft Human Resources, you process several types of temporary assignments:

- Expatriate. Home base employees who work in other countries or locations.
- Inpatriate. Employees from other countries who work in your company's home country.
- Third country nationals. Employees who are citizens of one country and have a home base in a second country but go on assignment to a third country. For example, a Canadian citizen with a home base in the U.S. may go on assignment to Saudi Arabia.

Temporary Versus Permanent Assignments

Before you process a new assignment, you determine whether the assignment is temporary or permanent.

In a temporary assignment, you expect the employee to return to a home base when the assignment ends. Before your employee leaves for a temporary global assignment, you establish a home base where you keep central employee, benefit, and payroll data for that employee. You keep this information at the location where the employee is permanently based, such as your corporate headquarters.

For temporary assignments, even those that last up to several years, you keep information on an employee at his or her current home base and create new records to track employee data for the new location. The new location is referred to as the host location. You maintain two sets of employee data: one set is home data and the other is host data for the new assignment abroad.

To keep two sets of current data for an employee, you create new employment record numbers, which precludes you from overwriting existing home information.

A permanent assignment is one where the host location becomes the employee's new home base. You do not expect the employee to return to his or her previous home base. For permanent assignments, all employee, benefit, and payroll data tracking should occur at the new location. You no longer need to keep employee data at the previous home base. When employees change to permanent assignments elsewhere, you transfer employee data using the Job Data pages in the Administer Workforce menu.

Processing Employees for a Global Assignment

Here's how you process employees for a global assignment:

1. Ensure that employees have home data-standard, permanent personnel administration data in PeopleSoft Human Resources, including employee IDs.
2. Set up data for dependents accompanying the employee on the assignment, including non-family members such as nannies.
3. Use checklists, standard or modified, for the tasks required to process an assignment.
4. Establish host data for each assignment, such as location, job code, and department.
5. Enter assignment details, including the start and end date of the assignment, the disposition of the employee residence, vehicle information, and furniture arrangements.
6. Enter payment instructions for supplemental earnings or deductions, such as cost-of-living adjustments, school tuition reimbursements, hypothetical tax deductions, and housing allowances.
7. When the assignment is completed, enter the end date.

PeopleSoft Human Resources also contains several supplemental pages to help you process assignments. You can:

- Enter identification data, such as passport and citizenship information for employees and their dependents.
- Track visas and permits required for employees and their dependents.
- Track company-paid travel.
- Provide information on international schools and programs.
- Review educational qualifications, competencies, accomplishments, and languages of employees.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Working with Multiple Employment Record Numbers

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Updating Workforce Information”

Defining Global Assignment Types

If you send employees on many types of global assignments, you can categorize assignments by groups, such as extended business travel or foreign service.

Pages Used to Define Global Assignment Types

Page Name	Object Name	Navigation	Usage
Assignment Type Table	ASSGN_TYPE_TABL E	Administer Workforce, Track Global Assignments (GBL), Setup, Assignment Type Table, Assignment Type Table Administer Workforce, Track Global Assignments (USF), Setup, Assignment Type Table, Assignment Type Table	Create new employee assignments.

Creating New Types of Employee Assignments

Access the Assignment Type Table page.

Assignment Type Table page

(GER) Defining German Assignment Types

When entering assignment types for Germany, specify them on this Assignment Type Table page. The following assignment types used in Germany are already part of the system data:

Type	Description
<i>A01</i>	<i>Assignment In-Country</i>
<i>A02</i>	<i>Assignment Expat DBA taxfree</i>
<i>A03</i>	<i>Assignment Expat DBA taxable</i>
<i>A04</i>	<i>Assignment Expat ATE taxfree</i>
<i>A05</i>	<i>Assignment Expat ATE taxable</i>
<i>D01</i>	<i>Business Related Travel In-Country</i>
<i>D02</i>	<i>Business Related Travel Out-of-Country</i>
<i>D03</i>	<i>Assembly Assignmmt DBA taxable</i>

Identifying Reasons for Assignments

When an employee starts or ends a global assignment, enter the corresponding personnel action in the Home/Host Data page. The following assignment-related actions are stored in the Translate Table:

Action	Action Code
Beginning of Assignment	<i>ASG</i>
End of Assignment	<i>ASC</i>

These action codes distinguish global assignments from other administrative actions that you make on employee data, such as pay rate changes, transfers, and leaves of absence. All action codes are stored in the Translate Table.

You might identify specific reasons for sending employees on assignments. For example, you might process some assignments that are due to a transfer of skills and others due to a shortage of local skilled personnel. To track assignment types more easily, specify reasons for them.

Use the Action Reason Table to set up reasons specific to global assignments. This table is in both the Track Global Assignments and Administer Workforce menus. Use the table in either menu because it is the same table. Once you define the codes, enter them in the Home/Host Data page.

See Also

“Starting New Assignments,” Entering Home/Host Information

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Setting Up the Administer Workforce Business Process,” Defining Reasons for Personnel Actions

Creating Checklists

Much of the information that you process for different assignment types and countries remains constant. To save yourself work (not to mention data entry errors or omissions), create standard checklists to streamline global assignment processing. For special situations, use standard checklists as the basis for creating modified checklists.

Set up checklists using the Checklist Item Table and Checklist Table in the Track Global Assignments menu or use the tables in the Administer Workforce menu; they are the same tables.

Defining Deductions and Earnings for Assignment Compensation

Global assignments may change an employee’s compensation at the permanent and assignment locations. Use the Deduction and Earnings Tables to enter any deduction and earnings codes that are required for global assignment compensation.

If you plan to use the codes that you set up exclusively to track assignment compensation, then use the Assignment Compensation pages in the Track Global Assignments menu.

Setting Up Assignment Compensation for PeopleSoft Payroll for North America

If your organization has implemented PeopleSoft Payroll for North America, use the Earnings and Deduction Tables in **Define Business Rules, Define Payroll Process, Setup 1**. Don’t use the Track Global Assignments menu because it includes only the first page and you need to set up information in all pages for each table.

Make the tables in the Track Global Assignment menu display-only to ensure that all updates take place using the pages in **Define Payroll Process, Setup 1**.

See Also

PeopleSoft Payroll for North America PeopleBook, "Defining Earnings and Using Earnings Codes"

Pages Used to Define Deductions and Earnings

Page Name	Object Name	Navigation	Usage
Deduction Table	DEDUCTION_TABL E1	Administer Workforce, Track Global Assignments (GBL), Setup, Deduction Table, Deduction Table	Add deduction codes and classification information. For deduction codes for global assignments, enter a Plan Type of 00 .
Deduction Table2	DEDUCTION_TABL E2	Administer Workforce, Track Global Assignments (GBL), Setup, Deduction Table, Deduction Table2	Define the type of tax treatment for assignment deductions.
Earnings Table	EARNINGS_TABLE1	Administer Workforce, Track Global Assignments (GBL), Setup, Earnings Table, Earnings Table	Add earnings codes for global assignments.

Adding Deduction Codes

Access the Deduction Table page.

Deduction Table		Deduction Table2	
Plan Type:	00	General Deduction	Deduction Code: KCAGR
Deduction Information Find First 1 of 1 Last			
*Effective Date:	01/01/1980		+ -
*Description:	Garnishment		
Short Description:	Garnishmnt		
Deduction Priority:	225		
Special Processing:	Garnishment		
Maximum Arrears Payback			
<input checked="" type="radio"/> No Maximum			
<input type="radio"/> Flat Maximum for Payback			
<input type="radio"/> Factor x Regular Deduction			
Deduction Subset Find View All First 1 of 1 Last			
*Subset ID	Description		+ -

Deduction Table page

Warning! Don't enter information in any fields on this page except **Effective Date**, **Description**, and **Short Description**. If you do, the system assumes the code that you define here is for payroll purposes when you enter the code in other assignment pages. You also get an error message because you didn't fill in all the required fields on the other pages for the table in the Pay Process menu.

Defining Tax Treatments

Access the Deduction Table2 page.

Deduction Table | Deduction Table2

Plan Type: 00 General Deduction
Deduction Code: B00-05 Buyback Pension Srvc - Repay 2

Deduction Information Find First 1 of 1 Last
Effective Date: 01/01/1900

Tax Classifications Find | View All First 1 of 1 Last
Deduction Classification
 After-Tax
 Before-Tax
 Nontaxable Benefit
 Nontaxable Btax Benefit
 Taxable Benefit
 QC Taxable Benefit

Canadian Sales Tax
 None
 Goods and Services Tax
 Harmonized Sales Tax
 Provincial Sales Tax
 Provincial Sales Tax Insurance
 Provincial Premium Tax

Special Accumulator(s) View All First 1 of 1 Last
***Accum Code:**
***Effect on Special Balance:** Adds to

Deduction Table2 page

Deduction Classification Select a deduction type: *After-Tax*, *Before-Tax*, *Nontaxable Benefit*, *Nontax Btax Benefit*, *Taxable Benefit*, and *QC Taxable Benefit*.

(Canadian) Sales Tax Select the type that is required in Canada: *None*, *Goods and Services Tax*, *Harmonized Sales Tax*, *Provincial Sales Tax*, *Provincial Sales Tax Insurance*, and *Provincial Premium Tax*.

Adding Earnings Codes

Access the Earnings Table page.

The screenshot shows the 'Earnings Table' page. At the top, the 'Earnings Code' is 'AAL'. Below this is a blue header bar with 'Earnings' and navigation icons. The main form contains several fields: '*Effective Date:' with a date picker set to '01/01/1980', '*Status:' set to 'Active', '*Description:' with 'Automobile Allowance', 'Short Description:' with 'Auto Allow', and '*Allowable Employee Types:' set to 'All'. There are three grouped sections: 'Payment Type' with radio buttons for 'Either Hours or Amount OK', 'Both Hours and Amount OK', 'Hours Only', 'Amounts Only' (selected), 'Unit/Override Rate', and 'Flat Amount'; 'Effect on FLSA' with radio buttons for 'None' (selected), 'Both Hours and Amount', 'Hours Only', and 'Amounts Only'; and 'Eligible for Retro Pay' with checkboxes for 'Eligible for Retro Pay' and 'Used to Pay Retro'. At the bottom, there are checkboxes for 'Hours Distribution' and 'Administrative Stipend Flag'.

Earnings Table page

Warning! Don't enter information in any fields on this page except **Effective Date**, **Description**, and **Short Description**. If you do, the system assumes the code that you define here is for payroll purposes when you enter the code in other assignment pages. You also get an error message because you didn't fill in all the required fields on the other pages for the table in the Pay Process menu.

Classifying Types of Company-Paid Travel

Because assignments can involve different types of company-paid travel, you need to identify those situations where the company pays for travel.

Pages Used to Identify Company-Paid Travel Types

Page Name	Object Name	Navigation	Usage
Travel Type Table	TRAVEL_TYPE_TABLE	Administer Workforce, Track Global Assignments (GBL), Setup, Travel Type Table, Travel Type Table Administer Workforce, Track Global Assignments (USF), Setup, Travel Type Table	Identify company-paid travel. Use the codes that you set up here to make travel arrangements for employees and their dependents in the Company Paid Travel page.

Identifying Company-Paid Travel

Access the Travel Type Table page.

*Effective Date	*Status	*Description	Short Description	Home Leave
01/01/1980	Active	Home Leave	Home Leave	<input checked="" type="checkbox"/>

Travel Type Table page

Home Leave

Select to indicate a travel type when employees are going on leave to their home (permanent) location.

If you specify a Home Leave when you are using the Company Paid Travel page, the system automatically sets the To location of the travel to the employee home domicile information that you defined for the assignment.

Entering Educational Qualifications and Skills

To identify the best-qualified employees to send on assignments, you review employee educational qualifications and skills and track additional education and skills that they acquire during assignments. Do this by entering assignment-specific school codes, major codes, or skill codes.

To set up codes specific to global assignments, use the Major, School, and Competency Tables in the Track Global Assignments menu or use them in the Manage Competencies menu; they are the same tables.

See Also

PeopleSoft Human Resources PeopleBook: Manage Competencies, “Using Competencies to Manage Training,” Managing Competency Training

CHAPTER 3

Starting New Assignments

This chapter provides an overview of starting new assignments and tells you how to:

- Set up global assignments.
- Process assignments with multiple home or host data.
- Enter passport and visa information.
- Work with dependent data.
- Enter additional data.
- Track supplemental earnings and deductions.
- Implement employee data security.

Note. Before you process a global assignment, a human resources record and Employee ID must already exist in the PeopleSoft Human Resources system for the employee. Also, ensure that the Multiple Jobs Allowed check box on the PeopleTools Options page is selected so that you can use multiple employment record numbers for employees. An assignment is a type of concurrent job.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce”

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Working With Multiple Jobs”

Understanding New Assignments

When you send an employee on a global assignment, you track new assignment details, additional employee earnings and deductions, and different benefits packages. You might also administer an employee’s personal affairs, such as housing, vehicles, and furniture. With PeopleSoft Human Resources, you easily settle your employees and their dependents in their new locations.

Using Checklists to Set Up Global Assignments

Checklists make remembering details easy. Use a standard list created in the Checklist Table or create a modified checklist. Set up global assignments by creating checklists to set up home and host locations. To tailor a checklist for an employee, use the Employee Checklist page, which is located in the Track Global Assignments menu. Use the same page from the Administer Workforce menu

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Creating Checklists and Setting Up Employee Checklists

Setting Up the Home Location.

To process employee global assignments, first establish home and benefits data. This is an employee's permanent data. Maintain this information at the employee's home base, such as corporate headquarters, and set up home and benefits data before setting up data for the host location.

The home location is an employee's permanent location. This is the place where the employee returns once a temporary assignment ends and where he or she gets information about the next global assignment.

Establishing home data requires the same steps as entering a newly hired employee into PeopleSoft Human Resources. If the employee already has a record in the system, do nothing else. You should already have most of the required employee's home data. If the person is a new employee who doesn't have a personnel record in PeopleSoft Human Resources, then enter the person into the system before processing the assignment.

An employee may have more than one job at home, and so has more than one home human resources record.

See Also

Processing Assignments With Multiple Home or Host Data

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

Pages Used to Set Up the Home Location

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Home Host	HOME_HOST_DATA	Administer Workforce, Track Global Assignments (GBL), Use, Home/Host Data, Home/Host Data Administer Workforce, Track Global Assignments (USF), Use, Home/Host Data	View and update data from the employee data pages. You must have previously hired the employee and entered him or her in the Hire component of the Administer Workforce (GBL) menu.
Home/Host Data - Benefits	JOB_DATA_BENPRG	Compensate Employees, Administer Pension Plan, Use, Payee Job Data, Benefit Program Data	Add or view benefits data from employee data pages. You must have previously hired the employee and entered him or her in the Hire component of the Administer Workforce (GBL) menu.

Viewing and Updating Home/Host Data

Access the Home/Host Data - Home Host page.

Location	The system displays the department Location , but only if the default Location SetID that is defined in the Department Table matches the control Location SetID defined for that Business Unit on the TableSet Control – Record Group page. You can change the Location code. Define location codes in the Location Table.
Job Code	The system displays the employee’s job code. The system stores valid job codes on the Job Code Table.
Payroll System	Select a Payroll System. The default value is the Payroll system that you select on the Job Data - Payroll Page.
Supervisor	The Supervisor that is entered on the Employment Data – Employment Information page appears by default.
Pay Group	The employee’s Pay Group appears. Employee Type appears by default from the Pay Group Table.
Tax Location	The federal, state, and local employee tax data and tax distribution data appear according to the information that you establish on your Tax Location Table.
Work Period	The time period in which employees must complete the standard hours. Valid values are stored on the Frequency Table. The system uses the annualization factor of the standard Work Period in combination with the standard hours to calculate FTE (full-time equivalency).
Employee Type	This value depends on the Pay Group . The system populates the field with the default value from the Pay Group Table. If an Employee Type doesn’t exist for this Pay Group , establish one in the Pay Group Table.
Std Hours (standard hours)	Defines how many hours the employee should work the job.

See Also

PeopleSoft Benefits Administration PeopleBook, Setting Up Flexible Credits

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

PeopleSoft Application Fundamentals for HRMS, "Setting Up Your HRMS System,"
Defaulting of Standard Hours and Standard Work Period

Viewing Home/Host Benefits Data

Access the Home/Host Data - Benefits page.

Home Host		Benefits	
Santos, Antonio		Employee	ID: KU0010 Empl Rcd#: 0
Benefit Record Number:	<input type="text" value="0"/>	Deductions Taken: Deduction	Deduction Subset ID:
Benefit Eligibility		View All First 1 of 1 Last	
Effective Date:	09/12/1997	Effective Sequence:	0 Job Indicator: Primary Job
Action / Reason:	Hire		
*Benefits System:	<input type="text" value="Benefits Administration"/>	Benefits Employee Status: Active	
BAS Group ID:	<input type="text" value="KU1"/> Basic US BAS Group		
Elig Fld 1:	<input type="text"/>	Elig Fld 2:	<input type="text"/>
Elig Fld 3:	<input type="text"/>	Elig Fld 4:	<input type="text"/>
Elig Fld 5:	<input type="text"/>	Elig Fld 6:	<input type="text"/>
Elig Fld 7:	<input type="text"/>	Elig Fld 8:	<input type="text"/>
Elig Fld 9:	<input type="text"/>		
Benefit Program Participation		View All First 1 of 2 Last	
*Effective Date	Benefit Program	Currency Code	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="01/01/1999"/>	<input type="text" value="KU1"/> GBI Master US Benefit Program	USD	
Job Data	Employment Data	Earnings Distribution	Benefits Program Participation

Home/Host Data - Benefits page

Benefit Program

Selecting a different benefit program doesn't affect other employee home data, so you can make changes on the Home Host Benefits page, or on the Benefit Program Participation Page in the Administer Workforce menu.

See Also

PeopleSoft Benefits Administration PeopleBook, Setting Up Flexible Credits

Setting Up the Host Location

Each time that you send an employee on a temporary assignment, you create a separate set of host and benefits data for that assignment. Host data includes information such as job, department, and location. Host benefits data consists of the employee's benefits program participation. By creating a separate set of data for the assignment, you retain permanent home and benefits data for the employee and track data for the current assignment.

The first time that you add host data for a new assignment, create a new employment record on the Home/Host Data and Home/Host Benefits pages. When one global assignment ends, reuse the same employment record for a new assignment.

The system creates and displays the new employment record number when you add a new value to the Home/Host Data page.

Note. You generally use one host employment record to track all global assignments for an employee, unless there are special circumstances, such as concurrent host assignments or different sets of benefits for a particular assignment. For these cases, add another employment record number to track the data separately.

Here's how you set up data for the host location:

1. Open the Home/Host Data component using the Add action.
2. Complete the necessary fields related to the host location on both pages:

Page	Affected Fields	Comments
Home/Host Data	Home/Host	The system populates this field with <i>Host</i> and makes the field unavailable for data entry.
	Supervisor's ID	<p>Leave this field blank until you select a Department or Position.</p> <p>Once you select the department or position, the system populates this field with the manager's ID, if you've selected a manager ID in the Department Table. You can override this value, or, if no manager ID exists in the Department Table, select one here.</p> <p>If you use full or partial position management, don't use this field at all. Instead, once you select a position number, the system enters data in the Reports To Posn (reports to position) and current Incumbent Supvr (incumbent supervisor) fields, which you select on the Position Data pages. The Supervisor's ID field disappears.</p>
	Reports To Posn (reports to position)	Leave blank. The Reports To Posn is unavailable unless you drive the system by position.
	Reason	Select a <i>Reason</i> for the assignment from the table of valid values.
	Position Number	If you drive part or all of your organization by position, enter the employee's assignment position number here. When you move out of this field, the system populates the Business Unit, Job Code, Department, Company, Location, and Pay Group fields and makes those fields unavailable for entry. If you don't enter the Position Number, enter the Business Unit.
	Posn Ovr (position override)	Select this check box to enter exceptions to any default position. The system makes other fields available for data entry.

Page	Affected Fields	Comments
	Posn Rcd (position management record)	When you use the Position Data pages to update position data that overlaps with employee job data, the system automatically inserts a new data row and selects this check box.
	Department	Select the employee's assignment Department. This field is required. Create departments on the Department Table - Department Profile Page.
	Location	When you move out of the Department field, the system populates the Location field from the value that you selected for this department in the Department Table. Override the value by selecting another location code from those stored in the Location Table.
	Job Code	Select a job code. Set up job codes in the Job Code Table.
	Company	If you assign a company to the department in the Department Table, a default company appears in the Company field on this page. You can't change this entry. If no company appears, select a company from the values in the Company Table.
	Pay Group	If you select a Pay Group in the Company Table, the default pay group appears. You can override the default. If one doesn't appear, select a pay group from the values in the Pay Group Table. This is a required field, even if you do not use PeopleSoft Payroll for North America.
Home/Host Data - Benefits	Effective Date	Enter the date when the employee's participation takes effect.
	Benefit Program	Select from the available options.

Page	Affected Fields	Comments
	Ben Rcd # (benefit record number)	<p>If the employee receives the same benefits on assignment as at the home location, set this value to match the benefits record number of the home data, usually 0. The Benefit Program Participation group box is unavailable for data entry.</p> <p>If the employee receives different benefits in the new assignment, enter a new benefit record number. Enter the same number that you used as the Employment Record number, in our example, 1. The Effective Date and Benefit Program fields are available for data entry in the Benefit Program Participation group box.</p>

When you save the new host information, the system stores the data in the employee's employment, job, and benefit program participation tables. These are the same tables where all standard employee data is stored.

See Also

Processing Assignments With Multiple Home or Host Data

PeopleSoft Human Resources PeopleBook: Manage Positions, "Setting Up Positions"

Processing Assignments With Multiple Home or Host Data

Although for most global assignments, the employee has one home employment record and one host employment record, you may encounter situations where an employee has more than one job at home or more than one assignment.

Adding Assignments When an Employee Has Multiple Jobs at Home

Some employees have more than one job record in the system before they go on a global assignment. For example, an American university professor going to teach at Oxford for a year might have two jobs in the U.S., one as a professor and another as a researcher. The employee already has two employment records in the system for the home jobs, so you need to create a third employment record for the host.

To track host data for an employee with multiple home records:

1. Create a new employment record for the host on the Home/Host Data page or in the Add Concurrent Job component in the Administer Workforce (GBL) or (USF) menu.

You can also use the Add Concurrent Job component in the Administer Workforce (GBL) or (USF) menu. The Add Concurrent Job action adds another employment record so that you (and the system) can differentiate between the jobs. In both instances, hiring and adding concurrent jobs, the system uses home as the default home/host class.

2. Enter assignment dates in Assignment Data.

Use the Assignment Data page to enter the beginning and ending dates of the host assignment.

When you enter the assignment End Date, the system checks to see if other home records have effective dates equal to or before the end date that you entered. If more than one current home data record exists, you see a message similar to the one below:

There is more than one Home record for this person. Indicate the home record for this assignment. (1060, 14)

Click OK to continue. Because you track only one home data record with an assignment, you associate one of the two home data records with the assignment.

3. Associate one of the two home records with the assignment on the Assignment Data – Home/Host page.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Adding Concurrent Jobs

PeopleSoft Human Resources PeopleBook: Manage French Public Sector, “Hiring French Public Sector Employees,” Adding Concurrent Jobs

Tying Multiple Home/Host Data to an Assignment

Adding Assignments When an Employee Has Multiple Host Locations

Some employees split their time between two or more locations during an assignment. For example, a manager sent to Japan might also be assigned to work in Korea at the same time. You might know this in advance, or the second job might begin after the employee has started the first job. Either way, these jobs are treated as different, concurrent host records in the system.

To track the data associated with multiple host records:

1. Create a separate employment record for each host on the Home/Host Data page.

Use the Add action to open the page. When the system prompts you for an Employment Rcd Nbr (employment record number), assign the next available employment record number, such as 2 or 3.

2. Enter assignment dates and other details on the Assignment Data page.

If assignment data already exists for the first host, you don't add new assignment data on the Assignment Data page. Create only one assignment for both hosts. Verify that the current assignment data has an end date that includes or extends beyond the ending date of the second assignment.

If you're creating both host records at the same time, enter the details of the new assignment on the Assignment Data page.

3. Associate both host records with the assignment on the Assignment Data – Home/Host page.

If you created assignment data for the first host earlier, Host 1 appears when you open the page. Click the Insert Row button to insert a new data row and select Host 2 so that the system can associate both records with the assignment.

If the assignment is new, insert two new data rows and designate the hosts as Host 1 and Host 2 so that the system can associate them both with the assignment.

Typing Multiple Home or Host Data to an Assignment

If an employee has more than one home record, associate one record with the assignment. If the employee has multiple, concurrent host records, link both host records with the assignment. Do this because the information that you enter on the Assignment Data - Assignment Home/Host page controls the earnings and deductions that track for home and host data on the Assignment Compensation page.

To associate a home record with an assignment:

1. Open the Assignment Data – Home/Host page.

If the employee has only one home data record or only one host data record, it appears on this page. If no home data record appears at all, that means the employee has multiple concurrent home records.

2. Insert a new data row.
3. In the Home or Host field, select *Home*.
4. Enter or select the Empl Rcd # (employment record number) for the home record that you want to associate with this assignment.

When you move out of this field, the system fills in the remaining fields.

5. Save entries.

To associate multiple host records with an assignment:

1. Open the Host/Home Data page.

If the employee has only one host data record, it appears on this page. If you haven't added host data on the Host/Home Data page, do so before you continue here. The system issues an error message if you try to save the information on this page when no host data exists.

If no host data appears and you have already added host data on the Host/Home Data page, it means the employee has multiple, concurrent host records.

2. Insert a new data row for each host location.
3. In the Home or Host field, select *Host 1* for the first location and *Host 2* for the second.
4. Enter or select the appropriate Employment Record Number for each location. When you move out of the field, the system fills in the remaining fields.

If no entries automatically appear in the display-only fields, then you've selected an employment record number for a host record that is after the ending date of the assignment. Either update the effective date of the host job information or change the ending date of the assignment.

5. Save entries.

Entering Passport and Visa Information

Each country has its own regulations governing foreign residents and workers, so it is useful to track information about the visas and permits required for employees to live and work in host countries. Use the Identification Data pages to record supporting documents for such things as nationality verification and passports. Use the Identification Data pages from either the Track Global Assignments or the Administer Workforce (GBL) menu.

The Issuing Authority field in both the Citizen/Passport and Visa/Permit pages aids in tracking the government agencies that issue passports and visas for employees and their dependents.

Before you process citizenship, passport, visa, and permit data for dependents, review Tracking Family and Dependent Data later in this section.

Setting Up Other Travel Data

Governments in every country have different requirements for foreigners, but much of the paperwork that you process for various permits and visas is the same.

Use the Supporting Document Table to set up codes for documents that employees and their dependents must often submit to government agencies, such as birth certificates, letters of employment, and marriage licenses. Use the codes to list all the paperwork necessary to apply for permits and visas required for non-citizens to visit or work in other countries. To set up visa and permit types by country, use the Visa/Permit Table.

Set up codes specific to global assignments with the Supporting Document Table and Visa/Permit Table in the Track Global Assignments menu or use the tables in the Administer Workforce menu; they are the same tables.

(USF) Setting Up Dependent Information

To enter dependent or beneficiary data, use the Dependent Data, Name/Address, and Personal Profile pages in the Track Global Assignments menu or the Benefits menu; they are the same pages.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Entering Additional Data in Human Resources Records,” Tracking Dependent and Beneficiary Data

Maintaining Assignment Data Related to Dependents

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Setting Up Your HRMS System,” Driving Your System by Employee or Position

PeopleSoft Benefits Administration PeopleBook, “Defining Eligibility Rules,” Setting Up Geographic Location Eligibility Rules

Tracking Family and Dependent Data

Track family and dependent data for employees in the host location.

Pages Used to Specify Dependents

Page	Object	Navigation	Usage
Family at Host	FAMILY_AT_HOST	Administer Workforce, Track Global Assignments (GBL), Use, Family at Host	Enter family and dependent information for employees in the host location.
Immediate Family	IMMEDIATE_FAMILY	Administer Workforce, Track Global Assignments (GBL), Inquire, Immediate Family	View family and dependent data for employees.

Note. These two pages can also be found on the Track Global Assignments (USF) navigation.

Entering Family and Dependent Information

Access the Family at Host page.

Family at Host

Reid, Charles M Employee ID: KC0004

Family at Host 1 of 1 View All

*Effective Date: [] [] [+] [-]

Assignment Type: Begin Date:

Family Size

Immediate: Immediate at Host: 0 Total at Host:

Dependents at Host 1 of 1 View All

Dependent ID	Occupation	Birthdate	Dummy Name	At Host
[] []				[] [+] [-]

Family at Host page

Assignment Type

The system displays the **Assignment Type**, **Begin Date**, and **End Date** of the assignment based on the **Effective Date**.

If you don't see information in these fields, it means that the information you're about to enter takes effect after the **End Date** entered in **Assignment Data**. To see assignment data, adjust either the **Effective Date** here or the **End Date** in **Assignment Data**.

Family Size

The system automatically determines the size of the **Immediate** family, which is defined as dependents who are the employee's spouse, son, or daughter.

Dependent ID

The system enters dependent information for all dependents added by using the **Dependent Data** pages.

At Host

The system automatically selects each dependent that is an immediate family member. For any family dependents not accompanying the employee, clear the **At Host** check box.

Select the **At Host** check box for any non-family member, such as a nanny, who is to accompany the employee.

As you make changes to **At Host** information, the system calculates and displays the number for **Immediate at Host** and the **Total at Host**, which includes any non-family members accompanying the employee on the assignment.

Adding Dependents to the Host Location

To add another dependent to the **Family at Host** page, first add the new dependent using the **Dependent/Beneficiary** pages. Position your cursor in the **Effective Date** field and click the **Insert Row** button to add a new data row. When you enter the effective date of the change,

the system refreshes the dependent list so that it now includes the new child. You don't need to check the **At Host** settings for the other dependents; the system retains the settings in the previous data row.

Removing Dependents From the Host Location

To reduce the number of dependents at host, position your cursor in the **Effective Date** field and click the **Insert Row** button. Enter the effective date of the change, clear **At Host** for that dependent, and save your changes.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Tracking Dependent and Beneficiary Data

Viewing Information on the Immediate Family

Access the Immediate Family page.

Immediate Family					
Santos, Antonio	Employee	ID: KU0010			
Dependent / Beneficiary Data					
					View All
					First ◀ 1-3 of 3 ▶ Last
Dependent Name	Birthdate	Birthplace	Relation	Marital Status	Occupation
Santos, Megan	10/12/1965		Spouse	Married	
Santos, Marguerite	03/18/1992		Daughter	Single	
Santos, Sean	09/17/1998		Son	Single	

Immediate Family page

The system displays the employee's name and **Employee ID**, along with the names and birth information for all dependents in the employee's immediate family, their relationship to the employee, occupations (if any), marital statuses, and occupations.

Entering Additional Data in the Assignment Data Component

To process global assignments, enter information not only on the assignment, but also on the disposition of employee residences and vehicles.

Note. PeopleSoft Human Resources also includes the Administer Company Cars business process to track all of your organization's car-specific benefits.

See Also

PeopleSoft Human Resources PeopleBook: Administer Company Cars, “Administering Company Cars for Your Workforce,” Understanding Company Car Management

Pages Used to Enter Additional Data

Page Name	Object Name	Navigation	Usage
Assignment Data	ASSIGNMENT_DAT A	Administer Workforce, Track Global Assignments (GBL), Use, Assignment Data, Assignment Data	Enter information about assignment types and dates.
Assignment Data - Assignment Home/Host	ASSIGNMENT_HOM HST	Administer Workforce, Track Global Assignments (GBL), Use, Assignment Data, Assignment Home/Host	View essential information for home and host employee data.
Assignment Data - Residence Home	RESIDENCE_HOME	Administer Workforce, Track Global Assignments (GBL), Use, Assignment Data, Residence Home	Enter information about the disposition of employee home residences and furniture.
Assignment Data - Residence Host	RESIDENCE_HOST	Administer Workforce, Track Global Assignments (GBL), Use, Assignment Data, Residence Host	Use the page to enter information about the location of the employee host residences and furniture.
Assignment Data - Vehicle Data	VEHICLE_DATA	Administer Workforce, Track Global Assignments (GBL), Use, Assignment Data, Vehicle Data	Track the location and status of vehicles that are assigned to employees.

Entering Information About Assignment Types

Access the Assignment Data page.

Assignment Data Assignment Home/Host Residence Home Residence Host Vehicle Data

Chabot, Yves Employee EmpID: KF0018

Assignment Data View All First 1 of 1 Last

*Begin Date: 11/01/1989 *End Date: 09/16/1993

*Assgn Type: FLA Foreign Loan Assignment

Departure Dt: Arrival Date:

Home Domicile

*Country: FRA France

Department: 92 Hauts de Seine

City: Levallois

Host Contact Information

Contact:

Comments

Assignment Data page

Assgn Type (assignment type)	Select from the values that created in the Assignment Type Table.
Departure Dt (departure date)	Enter the employee's estimated departure date from the home location.
Arrival Date	Enter the date that the employee is to arrive at the new primary host location.
Home Domicile	The system uses the Home Domicile values from the employee personal data as defaults. Use this information to process home leave travel on the Company Paid Travel page.
Host Contact Information	Enter contact information in this section.
Contact ID	Select a Contact ID for an employee in the host country who can be contacted by the home supervisor in case of emergency. The employee's name and work telephone number are provided.

Entering Home/Host Information

Access the Assignment Data - Assignment Home/Host page.

Assignment Data | Assignment Home/Host | Residence Home | Residence Host | Vehicle Data

Reid, Charles M Employee ID: KC0004

Assignment Home/Host

Assignment Type: Begin Date: [+] [-]

As of Assignment End Date [<< 1 of 1 >> View All]

*Home or Host: [Home] *Empl Rcd #: [] Company: [+] [-]

Business Unit: GBIBU Global Business Institute BU

Department:

Job Code:

Position Number:

Location Code: Country: Currency Code:

Assignment Data - Assignment Home/Host page

- Home or Host** Select **Home** or the appropriate hosting location.
- Department** The code appears for the department into which the employee was hired. The system stores valid values in the Department Table.
- Job Code** The employee's job code appears. The system stores valid job codes on the Job Code Table.
- Position Number** The **Position Number** for this employee appears. Define positions on the Position Data pages.

Most of the fields are display-only because you enter the data for them in other pages, including Home/Host Data and Assignment Data.

If you don't see information in these fields, it means that the home or host data takes effect after the ending date that you entered on the Assignment Data page for the current assignment. To see the information here, adjust either the effective date of the home or host data, or the ending date of this assignment on the Assignment Data page.

Entering Host Residences and Furniture

Access the Assignment Data - Residence Home page.

Assignment Data | Assignment Home/Host | **Residence Home** | Residence Host | Vehicle Data

Reid, Charles M | Employee | ID: KC0004

Residence Home | 1 of 1 | View All

Begin Date: | End Date: | Type: | + | -

Home Residence | 1 of 1 | View All

*Residence Number: 1 | + | -

Description: |

Home Residence Detail | 1 of 1 | View All

*Effective Date: 06/09/2000 | + | -

*Status Before Assignment: | *Home Furniture: |

*Status During Assignment: | Property Management

Comment: |

Assignment Data - Residence Home page

Residence Number	This appears by default to <i>1</i> , which you should leave unless you are using a different numbering sequence. Each time that you insert a new data row for another residence, the system assigns the next number in the sequence, such as <i>2</i> or <i>3</i> .
Status Before Assignment	Select the status of the employee's residence before the assignment. Valid values for these fields are in the Translate Table.
Status During Assignment	Select the status of the employee's residence during the assignment. Valid values for these fields are in the Translate Table.
Home Furniture	Select the disposition of the employee's Home Furniture associated with the residence.
Property Management	Select if your company is using a property management company to assist in administering residence details.

Entering the Location of Host Residences and Furniture

Access the Assignment Data - Residence Host page.

Assignment Data - Residence Host page

- Residence Number** This appears by default to **I**, which you should leave unless you are using a different numbering sequence. Each time that you insert a new data row for another residence, the system assigns the next number in the sequence, such as **2** or **3**.
- Description** Enter a **Description** of each residence of up to 30 characters.

To edit the data for the host address, click the **Edit Host Address** button. The Postal Address page appears.
- Host Residence Status** Select the **Host Residence Status** from valid values in the Translate Table.
- Host Furniture** Indicate the disposition of **Host Furniture** associated with the residence using a different set of values from those available for home residences; these values are in the Translate Table.

See Also

PeopleSoft Human Resources PeopleBook: Administer Your Workforce: "Hiring Your Workforce," Hiring an Employee

Tracking the Location and Status of Vehicles

Access the Assignment Data - Vehicle Data page.

Assignment Data - Vehicle Data page

Home Vehicle

Vehicle # (vehicle number) This appears by default to *1*, which you should leave unless you are using a different numbering sequence. Each time that you insert a new data row for another vehicle, the system assigns the next number in the sequence, such as *2* or *3*.

Reason Enter the **Reason** or status of the employee's vehicle.

Host Vehicle

Vehicle # This appears by default to *1*, which you should leave unless you are using a different numbering sequence. Each time that you insert a new data row for another vehicle, the system assigns the next number in the sequence, such as *2* or *3*.

Reason Select a **Reason** for the status from the values in the Translate Table.

Vehicle Status Select using a different set of values from those available for Home vehicles; these values are also in the Translate Table.

Date Available Enter the date that the vehicle is available to the employee.

Cash in Lieu Select the **Cash in Lieu** check box if the employee chooses to take cash instead of a company vehicle.

See Also

PeopleSoft Human Resources PeopleBook: Administer Company Cars, “Administering Company Cars for Your Workforce,” Understanding Company Car Management

Tracking Supplemental Earnings and Deductions

Employees on global assignments often are entitled to supplemental earnings, such as cost-of-living adjustments and hardship premiums. You might also take additional deductions from the employee’s paycheck because of estimated taxes.

Enter earnings and deductions as they relate to home and host assignment data. For example, an employee might receive a cost-of-living adjustment paid for by the host location and a hardship premium absorbed by the home location. Enter these components in multiple currencies; the system automatically calculates the equivalent amounts in the home currency.

To identify recurring payments or isolated incidents of supplemental earnings or deductions, track compensation data by employee and payment instruction type. We include two types of payment instructions: global compensation and one-time payments. These are sufficient for most compensation related to global assignments.

Before processing employee supplemental earnings or deductions, define any earnings and deduction codes that apply to global assignments using the Earnings Table and the Deductions Table.

Warning! The Assignment Compensation page isn’t linked to payroll processing in PeopleSoft Payroll for North America.

See Also

“Setting Up Basic Assignment Information“

PeopleSoft Payroll for North America PeopleBook, “Understanding Earnings Tables“ and “Understanding Deductions“

Pages Used to Track Supplemental Earnings and Deductions

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Assignment Compensation	ASSGNMT_EARNS_DED	Administer Workforce, Track Global Assignments (GBL), Use, Assignment Compensation, Assignment Compensation	Enter supplemental earnings and deductions that the home location pays, such as hardship premiums and relocation costs or that an employee receives from the host location, such as foreign housing or rent.

Adding Supplemental Earnings and Deductions

Access the Assignment Compensation page.

Assignment Compensation

Bassani, Maria Miss ID: 8901 Payment Instruction Type: Intl Comp

Assignment Compensation View All First 1 of 1 Last

*Effective Date: 07/19/2000 *Amount Frequency: A Annual + -

Assignment Type: Begin Date: End Date: Home Employee Net Amount:

Home / Host View All First 1 of 1 Last

*Home or Host: 0 Home + -

*From Currency Code: *To Currency Code: OFFIC

*Exchange Rate: *Rate Type: Home/Host Net Amount:

Earnings First 1 of 1 Last

*Code	Base Compensation:	Home Amount	Host Amount	+ -

Assignment Compensation page (1 of 2)

Deductions First 1 of 1 Last

*Code	Home Amount	Host Amount	+ -

Assignment Compensation (2 of 2)

Amount Frequency Select the amount of compensation frequency from the values in the Frequency Table. The fields available for selection are *Annual*, *Hourly*, or *Monthly*. All the amounts that you specify for both earnings and deductions must be for the frequency that you select in this field.

Assignment Type This appears based on the **Effective Date** in this page. If the information isn't displayed, it means that the information that you're about to enter takes effect after the End Date entered in Assignment Data. The system issues a warning message.

If you make a onetime payment that occurs after the ending date of the assignment, ignore the message. Otherwise, to see assignment data, adjust either the effective date here or the ending date in Assignment Data.

Home or Host Enter the employee record numbers corresponding to the Home or Host records. Generally 0 would be entered for the Home record and 1 for the Host record.

From Currency Code/To Currency Code	<p>If assignment data exists, the system sets the From Currency Code field to the currency for the country designated in the employee's home data. To view host supplemental earnings and deductions in the context of overall employee compensation, the system sets the To Currency Code field to the <i>home</i> currency, in this case U.S. dollars. Define currency codes in the Multicurrency: Maintaining Currency Tables.</p> <p>Because you enter compensation information related to home data, the system also sets the To Currency Code field to the home currency, which in this case is U.S. dollars. Override these defaults by selecting another currency code from the Currency Code Table.</p>
Rate Type	Appears by default to the rate type that is specified in the Installation Table, which you can override.
Rate Type	The exchange Rate Type appears by default to the rate that is specified in the Installation Table. If you enter information for home data, leave the default.
Code	To enter additional earnings charged to the home location, select a Code . Create these codes in the Earnings Table.
Base Compensation	The amount the employee earns at the home location, which you specify in Job Data Compensation.
Home Amount	Enter the Home Amount . Because you enter information related to home data, the Host Amount field doesn't appear.
Base Compensation	The amount the employee earns at the home location, which you specify in Job Data 2.
Code	Select a Code from the Deductions Table to enter deductions that should be taken from the employee compensation specified for the home location.
Home Amount	<p>Enter the Home Amount for the deduction Code.</p> <p>The Home Amount shows the net earnings and deductions specified for the home location. The Home/Host Net Amount displays the net amount of all supplemental earnings and deductions for both home and host. Both amounts are in the home currency.</p> <p>Because you enter information related to home data, the Host Amount field doesn't appear.</p>

See Also

PeopleSoft Application Fundamentals for HRMS, "Working With Currencies"

Handling Currency Fluctuations

The best way to ensure that you use consistent exchange rates for all employees is to update the exchange rate in the Market Rates Data Table (RT_RATE_PNL).

Once you update the exchange rate, open the Assignment Compensation page for each employee affected by the change, which includes all employees whose compensation is calculated using that currency. Insert a new data row using a new effective date by positioning your cursor in the Effective Date or Amount Frequency field and clicking the Insert Row button. The system copies all the information in the previous row to the new data row. The effective date for the new data row must be the same as or after the effective date that you used for the new exchange rate in the Exchange Rate Table. The system automatically recalculates all the home and host deduction amounts using the new exchange rate.

You also make other adjustments to earnings and deductions, such as deleting an earning or deduction that the home or host location no longer pays or adding new ones for which the employee is eligible.

See Also

PeopleSoft Application Fundamentals for HRMS, “Working With Currencies”

Implementing Employee Data Security for Global Assignments

Security access to employee data assumes greater importance when processing global assignments because Human resources administrators at multiple locations need access to data on the same employee. With multiple current home or host data at various locations around the world, security access can be a logistical nightmare.

However, the PeopleSoft Human Resources system eliminates this worry. Employees going on global assignments have at least one home record, which falls under the jurisdiction of the HR administrators at the home base, and at least one host record, which falls under the jurisdiction of the HR administrators at the host location. PeopleSoft Human Resources automatically checks each current employment record to identify all primary permission list groups that should have security access to the employee data.

Setting Up Security Access for Global Assignments

As delivered, PeopleSoft Human Resources implements employee data security with users grouped into primary permission list classes and data grouped by department. Modify your implementation of employee data security using user IDs, locations, or other groupings, but for our discussion here, we assume that you use primary permission list classes and departments.

See Also

PeopleSoft Application Fundamentals PeopleBook, “Administering PeopleSoft Security,”
Choosing a Security Type

PeopleTools PeopleBook: Application Designer

Security for One Home and One Host

Often, employees have data pertaining to one home and one host: they have one permanent job and go on one assignment after another, sequentially. To show you how organizational security works, in this section we look at a few examples of simple and complex global assignment situations involving Yves Chabot, an employee permanently based at CCB company headquarters in the United States, in department 1300. If you have setup your global assignment system by running the script SECVWITL and re-built all your security search views you can follow this example in the sample data.

Step 1: First Assignment

In 1989, Yves went on a four-year temporary assignment to the Edinburgh, Scotland office, department 21300. His home data (in France) uses employment record 0 and his host data (for Scotland) uses employment record 1. To administer human resource tasks for Yves, HR administrators in both France and Scotland need access to his data.

French administrators belong to the DPFRA primary permission list class, which allows them access to data for French departments in the company. The administrators in Scotland belong to the DPGBR primary permission list class, which allows them access to data for all departments in the UK.

PeopleSoft Human Resources checks to see if any future or current data rows for either employment record number (0 and 1) match the departmental access available to primary permission list classes for the human resources staff in the France and UK headquarters. A match exists for both primary permission list classes, so users in both classes have access to Yves’s job data for both employment records:

Employment Record	Department	DPFRA	DPGBR
0	13000	Access	Access
1	21300	Access	Access

Step 2: Second Assignment - Consecutive

In 1994, Yves completes his assignment in Edinburgh and begins another temporary assignment in Sydney, department 12000. HR administrators indicate that his temporary assignment in Scotland is over, which causes the data row containing data on this assignment (in employment record 1) to become history because it’s no longer current. Thus, when Yves’ assignment to Sydney takes effect, the users in the DPGBR primary permission list class don’t have access to Yves’ data.

The HR administrators in Sydney belong to the primary permission list class DPAUS, which gives them access to data for all departments in Australia.

When Yves begins his new assignment in Sydney, the assignment data uses employment record *1*, the same number used for his assignment in Edinburgh. Because the data row containing information about Sydney is current, the system now permits users in the DPAUS primary permission list class to access Yves employee data:

<i>Employment Record</i>	<i>Department</i>	<i>DPGBR</i>	<i>DPAUS</i>
0	13000	No Access	Access
1	12000	No Access	Access

The system continues to permit French users to access all of Yves' historical and current employee data.

Security for One Home and Multiple, Concurrent Hosts

The security process for multiple, concurrent host assignments is nearly the same as with one host. The system checks all current data rows for employment record numbers to determine which users and classes should have access to employee data, but there are more employment records and users.

Step 1: Second Assignment - Concurrent

Suppose Yves' story is changed. While he is working on temporary assignment in Sydney, he gets a second, concurrent temporary assignment in Singapore, department *15000*. The HR administrators operating in the Singapore office belong to the DPSGP primary permission list class, which allows them access to data for all departments in Singapore.

Because Yves has concurrent assignments, the Singapore assignment uses employment record *2*. Now, three primary permission list classes need access to his employee data: HR administrators in France, Australia and Singapore.

The system checks to see if any future or current data rows in the three employment record numbers (*0*, *1* and *2*) match the departmental access available to all three primary permission list classes. A match exists in all cases, so Yves job data is accessible to users in the three classes:

<i>Employment Record</i>	<i>Department</i>	<i>DPFRA</i>	<i>DPAUS</i>	<i>DPSGP</i>
0	13000	Access	Access	Access
1	12000	Access	Access	Access
2	15000	Access	Access	Access

Step 2: First Assignment Completed

In 1995, Yves completes his assignment in Singapore but continues to work on a temporary assignment in Sydney.

HR administrators indicate that his temporary assignment in Singapore is over. However, because the current row in Yves' employment record 2 still reflects a Singapore department, the users in Singapore can continue to access Yves data. Thus, the system permits French, Australian and Singapore users access to all of Yves historical and current employee data:

<i>Employment Record</i>	<i>Department</i>	<i>DPFRA</i>	<i>DPAUS</i>	<i>DPSGP</i>
0	13000	Access	Access	Access
1	12000	Access	Access	Access
2	15000	Access	Access	Access

Singapore users continue to have access to Yves information until another data row is inserted in employment record 2 and another department is selected. At that point, the data row containing the Singapore department becomes a history row, so they no longer have access.

Security for Permanent Transfers

When an employee goes from a temporary assignment to permanent status, the system automatically determines which of the primary permission list classes should continue to have access.

Step 1: Second Assignment Completed

In 1996, Yves Chabot completes his temporary assignment in Sydney and transfers back to the French headquarters.

HR administrators indicate that his temporary assignment in Sydney is over. However, as with the Singaporean, the Australian users continue to have access to Yves data because the current row in Yves employment record 1 still reflects an Australian department:

<i>Employment Record</i>	<i>Department</i>	<i>DPFRA</i>	<i>DPAUS</i>	<i>DPSGP</i>
0	13000	Access	Access	Access
1	12000	Access	Access	Access
2	15000	Access	Access	Access

The system continues to permit French, Australian and Singapore users to access all of Yves historical and current employee data.

Step 2: Permanent Transfer

In 1998, Yves' managers decide that things were running better in Sydney when Yves was on assignment there, so they transfer him back to Sydney, but this time permanently. That means Yves' home data now belongs in Sydney.

Using the Job Data pages, administrators transfer Yves back permanently for employment record 0, which is where his permanent (home) data is stored. Because this causes the data row containing his French department to become a history row, the French users no longer have access to Yves' data:

<i>Employment Record</i>	<i>Department</i>	<i>DPFRA</i>	<i>DPAUS</i>	<i>DPSGP</i>
0	13000	No Access	Access	Access
1	12000	No Access	Access	Access
2	15000	No Access	Access	Access

Employment records 1 and 2 contain data about temporary assignments that Yves went on in the past, with the current data rows still reflecting departments in Australia and Singapore. Although they are inactive data rows, they are still current rows, not history. Thus, Australia users have access to Yves department because the department in both employment records is Australia.

Australian administrators continue to have access because employment record 2 still contains a current row with an Australian office. These users have access until another data row is inserted in employment record 2 and another department is selected. At that point, the data row containing the Australian department becomes a history row, so they no longer have access to Yves' information.

Note. If you use Global and Local Country functionality with the Administer Workforce business process, then address additional security considerations.

See Also

Setting Up Security Access for Global Assignments

CHAPTER 4

Maintaining Data During the Assignment

This chapter provides an overview of data maintenance and discusses how to:

- Track company-paid travel information.
- Track educational data.
- Maintain information required for visas and permits.
- Review assignment information.
- End an assignment and start another.
- Transfer an employee permanently.

Tracking Company-Paid Travel

Use the Company Paid Travel page to track any travel for which employees are eligible. Enter information on dependents accompanying either the employee or another dependent.

Before you process company-paid travel for dependents traveling separately or with another dependent, refer to Maintaining Assignment Data Related to Dependents.

Pages Used for Company-Paid Travel

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
Company Paid Travel	TRAVEL_CMPNY_P AID	Administer Workforce, Track Global Assignments (GBL), Use, Company Paid Travel, Company Paid Travel Administer Workforce, Track Global Assignments (USF), Use, Company Paid Travel	Enter information about company-paid travel.

Entering Company-Paid Travel Information.

Access the Company Paid Travel page

The screenshot displays the 'Company Paid Travel' page for employee Santos, Antonio (ID: KU0010). The page is divided into several sections:

- Company Paid Travel Details:** This section contains various input fields:
 - *Date Eligible:** 07/21/2000
 - Date Taken:** (empty)
 - Assignment Type:** (empty)
 - Begin Date:** (empty)
 - *Type of Travel:** (empty)
 - *Mode of Travel:** Air
 - Amount/Currency:** USD
 - Cash In Lieu:** (checkbox, unchecked)
 - Alternate Location:** (checkbox, unchecked)
- From/To Location Fields:** Two side-by-side boxes for 'From' and 'To' locations. Both have:
 - Country:** USA
 - State:** (empty)
 - City:** (empty)
- Accompanying Dependent:** A table with columns for 'Dependent' and 'Birthdate'. The table is currently empty.

Company Paid Travel page

Note. If you don't see any information in these fields, it means that the **Date Eligible** (the date the employee is eligible for travel) is after the End Date entered in Assignment Data for the current assignment. If the employee should be eligible for this travel only before the assignment ends, adjust either the **Date Eligible** here or the End Date in Assignment Data.

Date Eligible	The date the employee is eligible for travel. Today's date appears, which you can change.
Date Taken	Enter, either now or later, the date of travel.
Type of Travel	Select from the list of valid values created in the Travel Type Table.
Mode of Travel	Select from the list of valid values from the Translate Table. This field appears by default to <i>Air</i> , which you can change.
Amount/Currency	Enter the cost of the travel ticket, or the maximum amount that the company authorizes for travel. The Currency appears by default to the currency designated on the Installation Table - HRMS Options page, which you can change. Valid values are in the Currency Code Table.
Cash In Lieu	Select if the employee opts for cash instead of company-paid travel.

Alternate Location	If you select the Home Leave check box in the Travel Type Table, the system displays the employee home domicile information from Assignment Date in the To group box, which becomes unavailable for data entry. The Alternate Location check box then becomes available for data entry. Select this check box if the employee chooses to travel to a location different from his or her home domicile. If you select Alternate Location , the To group box becomes available for alternate information entry.
Country	In the From group box, select the country from which the employee is traveling. If you change the Country code in either the From or To group box, the system clears the State and City fields so that you can enter new information. To track other instances of company-paid travel, enter a new data row.
Dependent	If a dependent is to accompany the employee during the travel, select the appropriate dependent ID. To add more dependents, position your cursor in the Dependent field and click the Insert Row button.
Birthdate	The dependent's birthdate appears.

Tracking Educational Data

Depending on the types of relocation packages that your company provides employees who are going on global assignments, you may offer information about schools for dependents. Use the international School/Program Tables to track data on each school and keep contact information up-to-date.

Your company may provide financial assistance to employees on global assignments, such as school tuition for children and language and orientation classes for adults. PeopleSoft Human Resources helps determine any educational assistance to which employees are entitled and tracks multiple institutions.

Pages Used to Track Educational Data

<i>Page Name</i>	<i>Object Name</i>	<i>Navigation</i>	<i>Usage</i>
School/Program Table	INTL_SCHPGM_TABLE	Administer Workforce, Track Global Assignments (GBL), Setup, School/Program Table, School/Program Table	Enter information about schools and orientation programs for employees.
School/Program Contact Table	INTL_CONTACT_TABLE	Administer Workforce, Track Global Assignments (GBL), Setup, School/Program Contact Table, School/Program Contact Table	Track contacts for schools and programs. You must have set up information for international schools and programs in the School/Program Table.
International School/Program	INTL_SCHOOL_PROGRAM	Administer Workforce, Track Global Assignments (GBL), Use, International School/Program, International School/Program	Enter information about payments for schools and other programs.

Entering School and Orientation Program Information.

Access the School/Program Table page.

School/Program Table

School/Program Code: K00001

Program Table Details View All First 1 of 1 Last

*Effective Date: 01/01/1980

*Status: Active

*Description: La Sorbonne Short Description: LaSorbonne

*Sch/Pgm Typ: Other *Int/Ext: External

Address

Country: FRA France

Address 1: 47 rue des Ecoles

Address 2:

Address 3:

Post Office:

City: Paris

Postal: 75005

Department: 75 Paris

School/Program Table page

Sch/Pgm Typ (school or program type) Examples from which to select include *Language School*, *Private School*, and *Public School*.

Int/Ext (internal or external) Select whether the school is *Internal* or *External*.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Local Country Functionality," Specifying the Address Format for a Country

Tracking Contacts for Schools and Programs

Access the School/Program Contact Table page.

School/Program Contact Table

School/Program Code: K00001 La Sorbonne

Program Contact Table Details [View All](#) First 1 of 1 Last

*Contact #: + -

*Name:

Title:

Contact Type:

Contact Phone Numbers [View All](#) First 1 of 1 Last

*Phone Type	Phone
<input type="text"/>	<input type="text"/>

+ -

School/Program Contact Table page

Contact # (contact number) Enter the **Contact #** of the school or program. For example, enter the headmistress of a school as the first contact, and the assistant headmistress as the second contact.

Contact Phone Numbers Enter the **Phone Type** and **Phone** (number) for the contact. List more than one **Contact Phone Number** for each contact by adding new data rows.

Entering Payment Information

Access the International School/Program page.

International School/Program

Jones, Susan Employee ID: K0G001

International School Program Details [View All](#) First 1 of 1 Last

*School/Program Code: Internal/External: + -

School/Program Type: Begin Date:

Amount: \$0.000

Payment Frequency: Total Scheduled Amt: 0.000

Payment Schedule [View All](#) First 1 of 1 Last

Due Date	Total Amt	Employer Amt	Employee Amt	Paid	*Reimbrsmnt Status
<input type="text"/>	\$0.000	\$0.000	\$0.000	<input type="checkbox"/>	Not Reimb

International School/Program page

- School/Program Code** Select a **School/Program Code**. When you leave this field, the system displays the **School/Program Type** and indicates whether the school is internal or external. Create this information in the International School/Program Table.
- Begin Date** Enter the period during which the employee attends the school or program.
- Amount** If you pay in a lump sum, enter the total amount. If you set up a payment schedule, leave this field blank. Once you create the schedule, the system calculates and sets the amount to the **Total Scheduled Amt** (total scheduled amount).
- The currency appears by default to the base currency designated in Installation Table - HRMS Options Page, which you can change. Valid currency codes are in the Currency Code Table.
- Payment Frequency** If you set up a payment schedule, select a payment frequency. Valid values are in the Translate Table.
- Due Date** Enter the due date for each payment due.
- Total Amt** (total amount) Enter the total amount of each payment.
- Employer Amt** (employer amount) Enter the amount paid by the company.
- Employee Amt** (employee amount) If the total and employer amounts are different, when you leave the **Employer Amt** field, the system calculates and displays the employee amount. This is the amount the employee pays.

Paid	Select the Paid check box when you've paid the total amount to the provider of the school or program.
Reimbursement Status	Select the status that reflects your organization's reimbursement policy for this particular payment. After you reimburse the employee, change this status to Reimbursed . If the amount the employee has paid can't be reimbursed, set the status to Unreimb (unreimbursable).
Total Scheduled Amt (total scheduled amount)	As you enter the payment schedule, the system calculates the total and displays it in the Total Scheduled Amt . When you save the information entered on the page, the system sets the Amount to the Total Scheduled Amt .
Payment Schedule	To add more payments, position your cursor in the Payment Schedule group box and click the Insert Row button.

Maintaining Assignment Data for Employees

You often add and update employee information, such as personal profile, citizenship, passport, and visa data. PeopleSoft Human Resources enables you to access and track this information for employees.

Add this information in the Use menu for employees, in the Identification component on the Citizenship/Passport and Visa/Permit Data pages. Before you add or this information for an employee, create employee data in the system and assign them employee IDs in the Administer Workforce menu.

Also access these pages from the Administer Workforce menu. All fields on these pages are described in Administer Workforce and in your Benefits documentation.

See Also

Entering Company-Paid Travel Information

PeopleSoft Application Fundamentals for HRMS PeopleBook, "Setting Up Your HRMS System," Driving Your System by Employee or Position

Maintaining Assignment Data Related to Dependents

PeopleSoft Human Resources gives you the ability to access and track information about dependents and beneficiaries.

The fields on the Dependent Data and Dependent Identification Data pages are the same as those on the Employee Data and Employee Identification Data pages. All fields on these pages are described in your benefits documentation.

Pages Used to Maintain Dependent Data

Page Name	Object Name	Navigation	Usage
Depdnt Identification Data - Depdnt Citizenship/Passport	CITIZEN_PP_DEP	Administer Workforce, Track Global Assignments (GBL), Use, Depdnt Identification Data, Depdnt Citizenship/Passport Administer Workforce, Track Global Assignments (USF), Use, Depdnt Identification Data	Enter or update dependent identification data, including citizenship, passport, visa, and permit data.
Travel Cmpny Dep	TRAVEL_CMPNY_DEP	Administer Workforce, Track Global Assignments (GBL), Use, Depdnt Company Paid Travel, Travel Cmpny Dep Administer Workforce, Track Global Assignments (USF), Use, Depdnt Company Paid Travel	Track any travel for which dependents of employees are eligible.
Intl School Dep	INTL_SCHOOL_DEP	Administer Workforce, Track Global Assignments (GBL), Use, Depdnt International School/P, Intl School Dep Administer Workforce, Track Global Assignments (USF), Use, Depdnt International School/P	Track beginning and ending dates and set up payment schedules for reimbursement in the designated currency.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Entering Additional Data in Human Resources Records,” Tracking Dependent and Beneficiary Data

PeopleSoft Application Fundamentals for HRMS PeopleBook, “Setting Up Your HRMS System,” Driving Your System by Employee or Position

PeopleSoft Human Resources PeopleBook: Base Benefits, “Enrolling Participants,” Entering Dependent or Beneficiary Data

(USF) Setting Up Dependent Information

To enter dependent or beneficiary data in PeopleSoft for US Federal, use the Dependent Data, Name/Address and Personal Profile pages in the Track Global Assignments menu or the Benefits menu. They are the same pages.

Entering Dependent Identification Information

Access the Depdnt Identification Data - Depdnt Citizenship/Passport page.

The screenshot displays the 'Depdnt Citizenship/Passport' page for employee Jones, Susan (ID: K0G001). The page is divided into several sections:

- Depdnt Citizenship/Passport** (selected tab) and **Depdnt Visa/Permit Data** (inactive tab).
- Employee information: Jones, Susan, Employee, ID: K0G001.
- Dependent Info** section with 'View All', 'First', '1 of 1', and 'Last' navigation.
- Dependent ID:** section with 'View All', 'First', '1 of 1', and 'Last' navigation.
- Citizenship Details** section with 'View All', 'First', '1 of 1', and 'Last' navigation. Fields include:
 - *Country: [] [Q]
 - Citizenship Status: [] [Q]
 - + - buttons
- Passport Details** section with 'View All', 'First', '1 of 1', and 'Last' navigation. Fields include:
 - *Passport Number: []
 - Issue Date: [] [B]
 - Expiration Date: [] [B]
 - + - buttons
- Issued By** section with fields:
 - Country: [] [Q]
 - [] [Q]
 - Authority: []
- Comment:** []

Depdnt Identification Data - Depdnt Citizenship/Passport page

All fields on these pages are described in your benefits documentation.

Note. If you administer a workforce in Germany, use the Visa/Permit Table to record OECD work permits for OECD nationals who want to work in a protected industry. Because permit types are keyed by country, if you track a German employee's OECD work permit information on the Identification, Visa/Permit Table in the Tracking Global Assignments menu, select *DEU* as the Country Code from among your valid OECD permit types.

See Also

Entering Company-Paid Travel Information

Tracking Educational Data

PeopleSoft Human Resources PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Adding Visas and Work Permits

PeopleSoft Human Resources PeopleBook: Administer Workforce: “Setting Up Country Specific Tables,” Entering German Nation Deuev Codes

Reviewing Assignment Information

This section provides an overview of reviewing assignment information.

Page Used to View Assignment Information

Page Name	Object Name	Navigation	Usage
Assignment Summary	ASSGNMT_SUMMARY	Administer Workforce, Track Global Assignments (GBL), Inquire, Assignment Summary, Assignment Summary Administer Workforce, Track Global Assignments (USF), Inquire, Assignment Summary	View information on an employee's assignment dates, location, and other details taken from the Job Data, Position Data, Job Code Table, and Department Table components.

Reviewing Employee Education, Language, and Driver's License Data

To identify the right employees for assignments, you review employee educational qualifications and competencies, such as the schools they've attended, their majors, and language abilities. You also update data to include new languages or education that employees gain during their assignments. If you assign a company car to an employee, you need their driver's license information.

You use the Education, Languages, and Entering Driver's License Data pages to review and update this type of employee data. These pages are located in the **Track Global Assignments** menu, but you can also use the pages in the **Administer Workforce** or the **Manage Competencies** menu; they are the same pages.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Entering Additional Data in Human Resources Records,” Entering and Tracking Additional Employee Data

PeopleSoft Human Resources PeopleBook: Manage Competencies, “Setting Up Competencies and Accomplishments,” Setting Up Educational Qualifications and Accomplishments

Ending an Assignment and Starting Another

If there is a lapse between assignments or the employee isn't going on another assignment, indicate in the system an ending date for this assignment. Use the Home Host page to end a global assignment for an employee, using an **Action/Reason** of *Assgn Comp* (assignment completion). If an employee has no lapse between assignments, meaning that as soon as this assignment is over he or she begins a new assignment, then skip this step.

If you send employees on new global assignments, use the Home Host page but don't create a new employment record number for each sequential assignment. Use the same employment record repeatedly by inserting data rows with information about new assignments.

See Also

“Starting New Assignments,” Viewing and Updating Home/Host Data

Transferring Employees Permanently

Sometimes an employee on temporary assignment stays at a location permanently. As a permanent employee, he or she shares the same status as a local employee. Therefore, you don't process personnel administration data for the employee at a different home location, as you do with temporary assignments. All employee, benefit, and payroll data tracking for the employee takes place at the new location because it is the employee's new home base.

Before you transfer an employee permanently, end all open temporary global assignments by following the instructions in Ending an Assignment and Starting Another . To make a permanent transfer, go to the Job Data page, insert a row, and enter the department, location, and job code for the permanent host assignment.

See Also

PeopleSoft Human Resources PeopleBook: Administer Workforce, “Updating Workforce Information,” Entering Departmental Transfers.

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