

PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook:
Administer Training

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Administer Training
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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by 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.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, 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.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft 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 that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

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See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</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.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID 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.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, 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.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access 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).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources Administer Training Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Administer Training* provides you with implementation and processing information for your PeopleSoft Human Resources system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, 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.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured.

Chapters	Description
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding...	This is an introductory chapter that broadly explains the product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.

Chapters	Description
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with PeopleSoft Human Resources Administer Training

This chapter provides an overview of PeopleSoft Human Resources Administer Training and discusses:

- PeopleSoft Human Resources Administer Training business processes.
- PeopleSoft Human Resources Administer Training implementation.

PeopleSoft Human Resources Administer Training Business Processes

PeopleSoft Human Resources Administer Training supports the following business processes:

- Setting up training programs and courses.
- (Optional) Setting up training costs.
- (Optional) Setting up training requirements.
- (Optional) Planning training budgets and running scenarios.
- Administering course sessions.
- Enrolling or waitlisting students.
- Tracking student training.
- (Optional) Tracking student costs.

We cover these business processes in the business process chapters in this PeopleBook.

PeopleSoft Human Resources Administer Training Implementation

The PeopleSoft Human Resources Administer Training table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Core Administer Training application tables.
- (DEU) Additional Administer Training application tables.

- (FRA) Additional Administer Training application tables.
- (MEX) Additional Administer Training application tables.

In the planning phases of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences.

Important! The order in which you set up tables required to implement PeopleSoft Human Resources Administer Training may vary; each individual application isn't necessarily set up in sequence. For example, you might set up tables in this order: HRMS tables, core Administer Training tables, country- or industry-specific tables, and additional Administer Training core tables. The order in which you set up tables may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

The Administer Training business process requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the Administer Training business process setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , "Getting Started With PeopleSoft HRMS"

Setting Up Core PeopleSoft Human Resources Administer Training Tables

The steps discussed in this section suggest an order in which you define the information in your core Administer Training tables. The information that you defined in your fundamental tables lays the foundation for this setup.

Setting up these core tables prepares your system to support these business processes:

- Administering training programs, courses, and sessions.
- Administering training requirements.
- Administering training costs and budgets.
- Enrolling and waitlisting students.
- Tracking student training.
- Tracking student costs.
- Creating reports and letters.

Step	Reference
1. Define vendor information.	Chapter 4, "Defining Training Courses and Programs," Pages Used to Set Up Vendors and Vendor Contacts, page 32

Step	Reference
2. Define training equipment, materials, and facilities.	Chapter 4, “Defining Training Courses and Programs,” Identifying Course Equipment and Materials, page 37
3. Define course instructors.	Chapter 4, “Defining Training Courses and Programs,” Adding Instructors, page 42
4. Define course categories.	Chapter 4, “Defining Training Courses and Programs,” Setting Up Course Categories, page 47
5. Define training courses.	Chapter 4, “Defining Training Courses and Programs,” page 29
6. (Optional) Define training catalogs and programs.	• Chapter 4, “Defining Training Courses and Programs,” Setting Up Training Catalogs and Programs, page 56 • Chapter 4, “Defining Training Courses and Programs,” Viewing and Reorganizing Courses, page 57
7. (Optional) Define training costs.	Chapter 3, “Setting Up Training Costs,” Understanding Training Costs, page 9
8. (Optional) Define student costs.	Chapter 3, “Setting Up Training Costs,” Setting Up Student Costs, page 22
9. (Optional) Define training budgets.	Chapter 3, “Setting Up Training Costs,” Setting Up Training Budgets, page 26
10. (Optional) Define training demand profiles.	Chapter 5, “Defining Training Requirements,” Setting Up Demand Profiles, page 65
11. (Optional) Define global training demands.	Chapter 5, “Defining Training Requirements,” Defining Global, Departmental, and Employee Training Demand, page 70
12. (Optional) Define departmental training demands.	Chapter 5, “Defining Training Requirements,” Defining Global, Departmental, and Employee Training Demand, page 70
13. (Optional) Define employee training demands.	Chapter 5, “Defining Training Requirements,” Defining Global, Departmental, and Employee Training Demand, page 70

(DEU) Additional Administer Training Tables

To track professional education programs for German employees, set up the following tables:

Step	Reference
1. Define the steps that make an educational program.	Chapter 11, “(DEU) Tracking Professional Educational Programs for German Employees,” Grouping the Steps into a Training Plan, page 187
2. Group the steps into a training plan.	Chapter 11, “(DEU) Tracking Professional Educational Programs for German Employees,” Identifying Steps, Grouping Steps, and Tracking Employee Progress, page 185

(FRA) Additional Administer Training Tables

To produce the French Training Report 2483, set up the following tables:

Step	Reference
1. Review the group setup for the 2483 report as delivered by PeopleSoft.	Chapter 12, “(FRA) Producing the French Training Report 2483,” Reviewing Setups for Groups and Indicators, page 190
2. Review the indicator setup for the 2483 report as delivered by PeopleSoft.	Chapter 12, “(FRA) Producing the French Training Report 2483,” Reviewing Setups for Groups and Indicators, page 190
3. Define additional parameters as required by your organization.	Chapter 12, “(FRA) Producing the French Training Report 2483,” Page Used to Enter Additional Report Parameters, page 192

(MEX) Additional Administer Training Tables

To produce the Mexican Mixed Committee report, set up the following table:

Step	Reference
1. Define details for the mixed committee.	<i>PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety</i> , “Creating and Tracking Incidents,” (MEX) Defining Mixed Committees

CHAPTER 2

Understanding PeopleSoft Human Resources Administer Training

This chapter discusses:

- PeopleSoft Human Resources Administer Training.
- PeopleSoft Human Resources Administer Training business processes.
- PeopleSoft Human Resources Administer Training integrations.
- PeopleSoft Human Resources Administer Training tables.

PeopleSoft Human Resources Administer Training

You use PeopleSoft Human Resources Administer Training to set up your company training architecture and manually enroll employees into the program. You can track course information for all students, including employees, temporary workers, and customers. You can accurately track the demand for training in your enterprise at the department or employee level.

PeopleSoft Human Resources Administer Training Business Processes

PeopleSoft Administer Training supports these business processes:

- Setting up training programs and courses.

You set up courses to create course sessions. After you set up courses, you can group the courses in categories and subcategories to further help administer and plan training.

- (Optional) Setting up training costs.

After you set up the training tables for vendors, instructors, training facilities, and equipment and define course codes and training programs, you can set up training costs.

- (Optional) Setting up training requirements.

You identify training demands on three levels: general, departmental, and employee.

- (Optional) Planning training budgets and run scenarios.

You can use budgetary scenarios (budgetary plans) to help plan budgets, approve demands, and track and freeze budgets. You can define as many scenarios as you need for different budgetary training plans.

- Administering course sessions.

Course sessions can be divided into cut sessions. Each cut session has its own start date, end date, location, and instructor.

- Enrolling or waitlisting students.

You can set up different methods of enrolling students and set up waiting lists when sessions are full. For all enrollment options, you can generate letters to notify students when you enroll them in a course, reschedule a course, or cancel a course session.

- Tracking student training.

You can track requirements and achieve career objectives. You can track on- and off-site training courses for both employees and non-employees (such as contractors or temporary workers).

- (Optional) Tracking student training costs.

You can handle student reimbursements for external course expenses. The system calculates reimbursable amounts according to schedules that you create. You run processes that update your organization's training costs as students complete courses and are reimbursed for training expenses. Costs are posted against your training budget.

We cover these business processes in the business process chapters in this PeopleBook.

PeopleSoft Human Resources Administer Training Integrations

PeopleSoft Human Resources integrates with all PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

PeopleSoft Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many PeopleSoft HRMS tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

We cover integration considerations in this PeopleBook.

Supplemental information about third-party application integration is located on the PeopleSoft Customer Connection Website.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Enterprise Integration Points in HRMS”

PeopleSoft Human Resources Administer Training Tables

This section discusses:

- Core tables.
- (DEU) Additional tables.
- (FRA) Additional tables.
- (MEX) Additional tables.

Core Tables

When implementing Human Resources Administer Training you set up the following tables, which form the building blocks for your training programs:

1. Defining vendor information.
2. Defining training equipment, materials, and facilities.
3. Defining course instructors.
4. Defining course categories.
5. Defining training courses.
6. (Optional) Defining training catalogs and programs.
7. (Optional) Defining training costs.
8. (Optional) Defining student costs.
9. (Optional) Defining training budgets.
10. (Optional) Defining training demand profiles.
11. (Optional) Defining your global training demands.
12. (Optional) Defining your departmental training demands.
13. (Optional) Defining your employee training demands.

(DEU) Additional Administer Training Tables

To track professional education programs for German employees, you set up the following tables:

1. Defining the steps that make an educational program.
2. Grouping the steps into a training plan.

(FRA) Additional Administer Training Tables

To produce the French Training Report 2483, you set up the following tables:

1. Reviewing the group setup for the 2483 report delivered with the system.
2. Reviewing the indicator setup for the 2483 report delivered with the system.
3. Defining additional parameters as required by your organization.

(MEX) Additional Administer Training Tables

To produce the Mexican Mixed Committee report, you define details for the mixed committee.

CHAPTER 3

Setting Up Training Costs

This chapter provides an overview of training costs and discusses how to set up:

- Training cost currency.
- Training cost units.
- Default training costs.
- Student costs.
- Training budgets.

Understanding Training Costs

This section lists prerequisites and common elements and discusses:

- Training cost and budget setup.
- Training currencies.

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

Prerequisites

Before you set up training costs, you must:

- Set up training tables for vendors, instructors, training facilities, and equipment.
- Define course codes and training programs.

Common Elements Used in This Chapter

Cost Unit

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

Default Costs

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

Facility	If the default facility is in the Training Facility table, select the facility code. When you move out of the field, the system displays the facility code. If the facility isn't in the Training Facility table, leave the Facility field blank and enter the facility name in the facility name field to the right of the code field.
Instructor ID and Name	If the instructor is defined in the Instructor table, select the instructor ID. Otherwise leave this field blank and enter the instructor's name in the Name field.
Room Code	Select a room for the courses from the list of rooms that are available at the selected facility. When you move out of this field, the room name appears. If you didn't select a training facility from the Training Facility table, this field is unavailable.
(FRA) Certified	Select if the vendor is certified to provide the training courses.
(FRA) Chargeable	Select if the costs are chargeable and can be declared on the 2483 Training report.

Training Cost and Budget Setup

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

To set up training costs and budgets:

1. Set up your training currency.

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

2. Review cost units.

Cost units are associated with a cost amount. For example, you might measure instructor costs per hour or per day, but the cost unit of mileage might be per kilometer. To enter a cost, enter the amount and then select a cost unit for that amount. PeopleSoft delivers a set of cost units in the Cost Unit table, and you can add cost units.

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

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

4. Set up student costs.

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

5. Set up budget periods and departmental budgets.

See Also

[Chapter 3, "Setting Up Training Costs," Setting Up Default Training Costs, page 16](#)

[Chapter 3, "Setting Up Training Costs," Setting Up Student Costs, page 22](#)

[Chapter 3, "Setting Up Training Costs," Setting Up Training Budgets, page 26](#)

Training Currencies

As you work in the Budget Training business process, the system displays up-to-date costs without running a periodic batch process to update costs or currency conversion information. The system can provide this immediate, updated cost information because it calculates costs as soon as you enter them into the system. The system converts all amounts to a single base currency and stores the computed costs in two training cost tables, TRN_ALL_COST and TRN_CST_ELEMENT.

When you open a summary page in the Budget Training or Administer Training menu to review cost information for an employee, a department, or the entire organization, the system converts the costs in the training cost tables to the display currency that is appropriate for the organizational level. Display currencies can be different from your training base currency.

Note. Departments can have display currencies that are different from the budget base currency for your organization. Depending on the business unit and the department that an employee belongs to, the employee level display currency could be different from your organizational currency. For a budget period, you associate a base currency with a business unit, and with the departments that are associated with that business unit, in the Budget Period table (BUDGET_PERIOD_TBL).

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

To set up training cost currency information:

1. Create a currency rate type for Budget Training.
Add a new rate type for Budget Training from the General Options menu.
2. Set up a training currency exchange rate.
Define the exchange rates that you want your Budget Training business process to track by selecting Define Business Rules, Define General Options, Setup, Market Rate.
3. Set up the base currency for Budget Training.
Even if you have already defined a base currency for PeopleSoft HRMS in the Define General Options menu, you must define a special training base currency before you can establish any training costs in the Training Administration business process.

Understanding Training Base Currency Defaults

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

In Budget Training, a further level of currency manipulation considers the nature of the cost before any cost conversions are performed.

A relationship is established between the nature of the cost and the use requirement at cost summary time. The nature of the cost describes the point in the business process at which you are reviewing costs. The following table describes this relationship:

Nature of Cost	Process Status	Currency Used for Costs
Budget training plan level.	Overall training plan cost summary for specified budget period.	Currency that is defined in the Budget Period table.
Department level.	Case 1: A budget has been allocated to the current department. Case 2: Current department isn't allocated a budget.	Case 1: Per unit cost base currency code that is defined in the Department Budget table. Case 2: Base currency that is defined in the Base Currency table for this business process.
No budget period or department; for example, employee training cost.	Specific to non-budgeted training.	Currency that is defined in the system Installation table.

Performing Training Cost Currency Conversions

The following table explains the training cost currency defaults in the Budget Training and Administer Training business processes. The table also details how the system uses the budget period begin dates or effective dates to establish the exchange rate to use for converting costs from one currency to another.

Cost Type	Currency
Training element cost; for example, facility cost.	Costs are stored in the currency that you enter.
Course costs and catalog costs.	Costs are stored in table TRN_XXX_COST in the entered currency. Computed costs are stored in TRN_CST_ELEMENT with the base currency. The system uses the effective date that is entered on the page as the currency conversion date.
Salary costs (general demand).	Costs are stored in table TRN_DEMAND in the currency that you entered. The system stores computed costs in TRN_CST_ELEMENT in the base currency. The date that the system uses for the conversion from the entered currency to the base currency is the begin date of the budget period for which the demand was defined.
Displayed costs (summary pages, budget plan).	The system converts costs from the base currency to the displayed currency. The date that the system uses for the conversion is the begin date of the budget period.

The date that the system uses to convert to the base currency and the date that the system uses to convert to the display currency are not the same, except for the job code cost. The system uses the effective date of the course and catalog costs to convert to the base currency and the begin date of the budget period to convert to the display currency.

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

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Currencies”

Setting Up Training Cost Currency

The first step in setting up training costs is to define the currency to use in the Budget Training business process. This section discusses how to set up your currency and currency exchange rate.

Page Used to Set Up Training Cost Currency

Page Name	Object Name	Navigation	Usage
Base Currency	TRN_BASE_CURRENCY	Set Up HRMS, Product Related, Enterprise Learning, Base Currency, Base Currency	Specify the base currency to use to track all cost amounts.

Specifying the Base Currency for Tracking Cost Amounts

Access the Base Currency page.

Base Currency

*Base Currency:

USD

*Exchange Rate Type:

OFFIC

Base Currency page

- Base Currency

Select a currency code.

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

Select the currency for the Budget Training business process.

If you've defined an exchange rate type for training, associate it with your training base currency here. The exchange rate type that you specify controls currency conversion processing in the Administer Training and Budget Training business processes.

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

See Also

Chapter 3, "Setting Up Training Costs," Setting Up Default Training Costs, page 16

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Working With Currencies"

Overview of Cost Units and Cost Type

You enter per-unit costs for training components like facilities, vendors, books, and other materials on pages throughout the Budget and Administer Training business processes. The system uses the cost unit type that is associated with a training component to determine the subset of cost units to display as you enter cost information.

Using Views to Select the Right Cost Unit

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

For expenses, the system performs no special cost unit type selection; You can select any Cost Unit table (COST_UNIT_TBL) values.

Using Cost Type and Duration Amounts

The duration cost unit is a display-only label that is based entirely on the cost unit that you select as the per-unit cost to which the duration value is related. For example, when you enter a cost for instructors on the Course Session Cost table, two instructors might teach the same course session. They might work together to teach the course session at the same time, or one might present one portion of the session, and the other might present a different portion. In either case, you need to specify how long each instructor works on this course session.

You enter a duration period for each instructor. The unit for this duration period depends on the cost unit that you selected as the per-unit cost amount for the instructor:

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

See Also

Chapter 6, "Planning Training Budgets," Understanding the Training Budget Planning Process, page 83

Setting Up Training Cost Units

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

This section discusses how to specify the relationship between the cost unit and duration label on the Cost Type table.

Page Used to Set Up Training Costs

Page Name	Object Name	Navigation	Usage
Cost Unit Table	COST_UNIT_TABLE	Set Up HRMS, Product Related, Enterprise Learning, Cost Unit, Cost Unit Table	Specify the relationship between the cost unit and the duration label.

Specifying the Relationship Between the Cost Unit and Duration Label

Access the Cost Unit Table page.

Cost Unit Table

Cost Unit: D

***Description:** Day

Short Description: Day

***Cost Unit Type:** Time

Duration Label: Day

Factor to Convert to Annuity: 240.000000

Cost Unit Table page

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

Cost Unit

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

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

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

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

	<i>Training:</i> For training cost types (for example, flat cost or person/day). <i>General:</i> For when you don't know the cost type.
Duration Label	Enter the duration label to use for specifying instructor cost details. The unit of this duration depends on the cost unit that you select. For example, if the instructor cost unit is USD 200 per person, per day, the duration is expressed in days.
Factor to convert to annuity	This factor determines by how many times the duration is multiplied to be equal to one year. This factor is useful to parameterize the number of working weeks in a year or the number of hours in a year. Here is the factor provided by the system: Year: cannot be modified by the user – factor = 1 Month: 12 Week: $12 \div 4 = 3$ Day: $12 \times 20 = 240$ Hour: $12 \times 20 \times 8 = 1920$.

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

Setting Up Default Training Costs

This section provides an overview of training costs and discusses how to:

- Enter vendor, facility, and equipment costs.
- Define the source of training costs.
- Enter instructor costs and other expenses.

Understanding Default Training Costs

Training costs are defined in two parts: per-unit cost and cost unit. The per-unit cost is the amount, and the cost unit is the unit that is associated with that amount. For example, if an instructor costs USD 100 per hour, the per unit cost is 100 and the cost unit is hour.

When you specify course element costs on the Catalog Cost table, the Course table, and Course Session Cost table, some cost elements tend to be the same. For example:

- Instructors tend to charge the same fee for teaching different courses.
- Facility costs and vendor costs tend to remain constant for different courses.

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

Defining Catalog Costs

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

In your course catalog, you can organize your courses into categories and subcategories for easier administration. You can associate a cost with each category and subcategory. Then when you assign a course to a category or subcategory, the system assigns the subcategory cost as the default cost of the course.

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

Defining Course Session Costs

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

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

See Also

[Chapter 7, “Administering Course Sessions,” page 111](#)

Pages Used to Set Up Default Training Costs

Page Name	Object Name	Navigation	Usage
Course Costs - Vendor, Facility, Equipment	TRN_COST_TBL1_GBL	Set Up HRMS, Product Related, Enterprise Learning, Course Costs, Vendor, Facility, Equipment	Define the cost of courses in your training catalog. These costs may be the same as the costs associated with the category or subcategory to which the course belongs.
From which Category/Sub-Category	TRN_CATLG_CRSE_SEC	Click the Default Costs button on the Course Costs - Vendor, Facility, Equipment page.	Select the source of default costs.
Course Costs - Instructor, Expense	TRN_COSTC_TBL2_GBL	Set Up HRMS, Product Related, Enterprise Learning, Course Costs, Instructor, Expense	Enter default instructor costs and other expenses that are associated with courses in a selected category or subcategory.
Catalog Costs - Vendor, Facility, Equipment	TRN_COSTC_TBL1_GBL	Set Up HRMS, Product Related, Enterprise Learning, Catalog Costs, Vendor, Facility, Equipment	Enter the default vendor, facility, and equipment costs for a category or subcategory that is defined on the Category/Subcategory Table page.
Catalog Costs - Instructor, Expense	TRN_COSTC_TBL2_GBL	Set Up HRMS, Product Related, Enterprise Learning, Catalog Costs, Instructor, Expense	Enter default instructor costs and other expenses that are associated with courses in a selected category or subcategory.

Entering Vendor, Facility, and Equipment Costs

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

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

Category Code: COMMUNICTN **Subcategory Code:** AWARENESS

Catalog Cost Find | View All First 1 of 1 Last

*Effective Date: 05/31/2000 [Calendar Icon] **Default Costs** + -

Vendor

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

▶ France

Facility

Vendor: [Search Icon] Facility: [Search Icon]

Room Code: [Search Icon]

Per Unit Cost: [Search Icon] *Cost Unit: Hour

Session Equipment/Materials Find | View All First 1 of 1 Last

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

Course Costs - Vendor, Facility, Equipment page

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

Vendor

If an external vendor runs the course, define the default vendor costs here.

Vendor

Select the default vendor for the category or subcategory.

Per Unit Cost

If you have set up vendor costs, the default value is the vendor cost from the Vendor table. You can override the default.

Facility

Vendor

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

Per Unit Cost

If you have set up room costs, the system populates the room cost from the Training Room table. You can override the default.

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

Session Equipment/Materials

Equipment/Materials Code Select the equipment code. Insert a row for each equipment or material code required for the course.

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

See Also

Chapter 3, “Setting Up Training Costs,” Setting Up Training Cost Units, page 15

Chapter 12, “(FRA) Producing the French Training Report 2483,” page 189

Defining the Source of Default Costs

Access the From which Category/Sub-Category page.

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

Subcategory Code Select the subcategory codes.

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

Entering Instructor Costs and Other Expenses

Access the Course Costs - Instructor, Expense page.

The screenshot shows the 'Course Costs - Instructor, Expense' page. At the top, there are tabs for 'Vendor, Facility, Equipment' and 'Instructor, Expense'. The 'Instructor, Expense' tab is selected. Below the tabs, the 'Category Code' is 'COMMUNICTN' and the 'Subcategory Code' is 'AWARENESS'. The 'Catalog Cost' section has an 'Effective Date' of '05/31/2000'. The 'Instructor' section has a table with columns: 'Vendor', 'Instructor ID', 'Per Unit Cost', and '*Cost Unit'. The 'Expense' section has a table with columns: '*Expense Type', '*Qty', '*Per Unit Cost', and '*Cost Unit'. Both sections have search icons and a 'From Course' checkbox.

Course Costs - Instructor, Expense page

Instructor

Vendor	If an external vendor runs the course, select the vendor ID from the list of vendors. If you're using an internal instructor, leave this field blank.
Per Unit Cost	This value is automatically populated from the Instructor table. You can override the default cost.
Duration	This field is automatically populated with the Duration value that you set up on the Course Table - Course Profile page. To override the default, clear the From Course check box and enter the new value.
From Course	This check box is automatically selected to show that the Duration field was populated from the Course table.

Expense

Expense Type	Select the expense type.
Qty (quantity)	Enter the quantity of the item that is specified in the Expense Type field.
Per Unit Cost	Enter the per-unit cost for the expense.

Overview of Student Training Cost Defaults

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

Page Name	Default Comes From
Job Code Training Cost	No default.
Employee Training Cost	Job Code Training Cost page.
Employee Demand	1. Employee Training Cost page, when defined. 2. Otherwise Job Code Training Cost page (with employee's job code). 3. Otherwise default values are set to blank.
General Demand	Default values are set to blank; however, when a profile is used as a template, the training cost is computed with the employees and job codes that are included in the profile. Use the Compute button to compute the training cost with the job codes that are listed on the page.

Page Name	Default Comes From
Department Demand	No default.
Employee Demand by Course	Same as the Employee Demand page.

See Also

Chapter 5, “Defining Training Requirements,” Demand Methods, page 62

Setting Up Student Costs

This section discusses how to:

- Identify the compensation cost for training an employee.
- Identify the cost for training an employee.
- Process training costs for a group.

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

Note. (FRA) If your organization runs PeopleSoft Global Payroll for France, you can extract Administer Training and Budget Training costs from the payroll system and apply the costs to employees in a specified group ID.

Understanding Student Costs

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

- The costs that are associated with the course, such as the price of materials and instructors.
- The cost to your organization of the employee’s lost work time.

For example, if employees typically bill their time to clients, then they cannot bill time while they are in training. This represents an additional training expense.

To track payroll costs that are associated with training, you can specify compensation costs at the job code level and at the individual employee level. To associate payroll costs with a group of similar job codes or a group of employees, use the Populate EE Training Costs (populate employee training costs) process to perform a mass update of your system.

Pages Used to Set Up Student Costs

Page Name	Object Name	Navigation	Usage
Job Code Training Cost	TRN_JOB_SLR_COST	Set Up HRMS, Product Related, Enterprise Learning, Job Code Training Costs, Job Code Training Cost	Identify the compensation cost of having an employee in this job code in training.
Employee Training Cost	TRN_EE_SALARY_COST	Set Up HRMS, Product Related, Enterprise Learning, Employee Training Costs, Employee Training Cost	Identify the cost of having an employee in training.
Populate EE Training Cost (populate employee training cost)	RUNCTL_TRN006	Enterprise Learning, Define Budget, Update Training Costs, Populate EE Training Cost	Process training costs for a group of job codes or employees.

Identifying the Compensation Cost for Training an Employee

Access the Job Code Training Cost page.

Job Code Training Cost

SetID: SHARE Table Set shared across Corp
Job Code: 110000 Accountant

Training Cost Details
Customize | Find | View All | First 1 of 1 Last

*Effective Date	*Status	*Per Unit Cost	*Currency	*Cost Unit
01/01/1999	Active	35.00	USD	Pers/Day

Job Code Training Cost page

Per Unit Cost

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

Identifying the Cost for Training an Employee

Access the Employee Training Cost page.

Employee Training Cost

Allerseelen, Gregor Employee **EmplID:** 0002 **Empl Rcd#:** 0

Training Cost Details
Customize | Find | View All | First 1 of 1 Last

*Training Type	*Effective Date	*Status	Per Unit Cost	*Currency	*Cost Unit
Budget Trn	11/06/2002	Active	0.00	USD	Pers/Month

Employee Training Cost page

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

Common Page Information

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

Admin. Trg (administer training).

Budget Trg (budget training).

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

Job Tab

Job Code Displays the employee's job code from the Job Data table.

Period Tab

Period Begin Date and Period End Date Enter beginning and end of the period in which the cost that you specified becomes effective.

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

Calc. Flag (calculate flag) The system sets this field to *Manually* to indicate that the cost was entered manually.

See Also

Chapter 12, "(FRA) Producing the French Training Report 2483," page 189

Processing Training Costs for a Group

Access the Populate EE Training Cost page.

Populate EE Training Cost page

Note. The Job Code Training Cost and Employee Training Cost pages enable you to associate payroll costs with a job code and by employees one at a time. Use the Populate EE Training Cost process to specify a per-cost figure and a cost-unit metric to apply on the specified effective date to a group of job codes or employees.

As Of Date	Enter the effective date for this process.
Per Unit Cost	Enter the cost to use for processing the cost per job or cost per employee. (FRA) If you select Load from Global Payroll to take costs from your payroll system, costs are not entered manually, so the system makes the Per Unit Cost field unavailable.
Apply on Jobcodes	Select to apply the cost to employees with a specified job code. The system displays the SetID and Jobcode scroll area.
Apply on Employees	Select to apply the cost to given employees. The system displays the EmplID (employee ID) scroll area.
(FRA) Load from Global Payroll	Select to apply costs from PeopleSoft Global Payroll for France to a group of employees. The system displays the France group box.

SetID and Jobcode Scroll Area

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Groups”

PeopleSoft 8.8 Global Payroll PeopleBook

PeopleSoft 8.8 Global Payroll for France PeopleBook

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Setting Up Training Budgets

This section discusses how to:

- Define budget periods.
- Define amounts allocated to departments.

Pages Used to Set Up Training Budgets

Page Name	Object Name	Navigation	Usage
Budget Period Table	BUDGET_PERIOD_TBL	Enterprise Learning, Define Budget, Budget Period, Budget Period Table	Define budget periods.
Department Budget	TRN_BUDGET_TBL	Enterprise Learning, Define Budget, Department Budget, Department Budget	Define the amount that is allocated to departments in your organization for training in a specified budget period.

Defining Budget Periods

Access the Budget Period Table page.

Budget Period Table

Budget Period: KF002
***Description:** Year 2002 Budget Period
Short Description: Year 2002
From Date: 01/01/2002  ***Thru Date:** 12/31/2002 

Budget Period Details
Find | View All
First  1 of 1  Last

***Business Unit**
FRA01  France Business Unit

Base Currency
EUR 

Budget Period Table page

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

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

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

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

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

From Date and Thru Date (through date) Enter the from (begin) and through (end) dates for the budget period.

Business Unit Select the business unit and corresponding base currency for the various parts of your organization to be included within this budget period.

Add as business units by inserting new rows. This enables you to create training budgets for the employees in those business units. When you set up and track budgeting demands, you can use only budget periods that are assigned to an employee's business unit. You associate employees with business units on the Job Data component in Administer Workforce .

See Also

Chapter 3, "Setting Up Training Costs," Setting Up Training Cost Currency, page 13

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Using PeopleSoft HRMS," Setting Up Business Unit and SetID Functionality

Defining Amounts Allocated to Departments

Access the Department Budget page.

Department Budget			
Budget Period:	KF002	Business Unit:	FRA01 France Business Unit
Department:	15000		Hotline- Bordeaux
*Description:	Budget 2002		
Short Description:	Budget 200		
Allocation Date:	12/01/2001		
Originating Emplid:	KF0001		Berger,Maurice
Budget Amount:	45734.71		EUR

Department Budget page

Allocation Date	Enter the date that you allocate the budget to the department.
Originating Emplid (originating employee ID)	Select the ID of the person who allocated the budget.
Budget Amount	Enter the currency to use when you compare the actual and budget costs by department. The system also uses this value as the currency default value on pages where the Budget Training process calculates department budget costs to ensure that costs and budget are in the same currency.

See Also

Chapter 3, “Setting Up Training Costs,” Setting Up Training Cost Currency, page 13

CHAPTER 4

Defining Training Courses and Programs

This chapter provides an overview of training administration and discusses how to set up:

- Vendors and vendor contacts.
- Training equipment, materials, and facilities.
- Course instructors.
- Course categories.
- Courses.
- Training catalogs and programs.

Understanding Training Administration

This section lists prerequisites and discusses:

- Training courses and related information.
- Training programs.

Training Courses and Related Information

Courses are the foundation of in-house course session administration. Before you set up course sessions, you set up courses. You use course codes to track external courses that employees attend frequently, such as classes offered at local colleges or trade associations.

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

Before you set up training courses or work on training budgets, you define several areas that are related to training administration. These include:

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

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

Training Programs

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

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

Prerequisites

This section discusses how to define competencies and accomplishments.

Working With Tables

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

Defining Competencies and Accomplishments

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

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

- Competency table
Organize and group competencies.
- License/Certification table
Define licenses or certificates that are required to teach the course or achieved by completing the course.
- Language table
Set up language codes to track employee and non-employee language skills.
- Major table
Identify areas of study.
- Test Table
Track standard tests (such as typing or aptitude tests) that you administer to job applicants or employees. You can include a test code as an instructor requirement.
- Membership Table
Add membership codes if instructors need to belong to professional organizations or other associations to teach specific courses.
- Degree Table
Identify types of degrees and years of study associated with degrees.

Note. (USF) Federal users must set up this table.

- School Table

Create codes to track courses at schools and colleges.

You access these tables from the Training menu.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Languages,” Setting Language Preferences

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Setting Up Competencies and Accomplishments,” Understanding Competencies

Setting Up Vendors and Vendor Contacts

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

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

If you’re administering training programs for French employees and you need to generate the French Training Report 2483, you can also use the Vendor table to track Finance Fund providers.

This section discusses how to:

- Enter basic vendor information.
- Enter vendor addresses.
- Enter vendor contact details.
- Enter vendor contact addresses.

Pages Used to Set Up Vendors and Vendor Contacts

Page Name	Object Name	Navigation	Usage
Vendor Profile	TRN_VENDR1_TBL_GBL	Enterprise Learning, Define Training Resources, Vendors, Vendor Profile	Enter basic information about a vendor.
Address	TRN_VENDR2_TBL_GBL	Enterprise Learning, Define Training Resources, Vendors, Address	Enter the vendor's address and the default cost charged by the vendor.
Vendor Contact Phone	TRN_VNDR_CNTCT_TB1	Enterprise Learning, Define Training Resources, Vendor Contacts, Vendor Contact Phone	Enter the details of a vendor contact.
Vendor Contact Address	TRN_VNDR_CNTCT_TB2	Enterprise Learning, Define Training Resources, Vendor Contacts, Vendor Contact Address	Enter the address of a vendor contact.

Entering Basic Vendor Information

Access the Vendor Profile page.

The screenshot displays the 'Vendor Profile' page with the 'Address' tab selected. The page contains the following fields and sections:

- Vendor ID:** HXSKY
- *Description:** Sky Trainers
- Short Desc:** Sky Traine
- *Vendor Type:** Consulting Firm (dropdown menu)
- Accounts Payable Vendor ID:** (empty field)
- Country:** France (dropdown menu)
- Financing Type:** (dropdown menu)
- Certification Section:**
 - ☐ Certified
 - Number:** (empty field)
 - Date:** (empty field with calendar icon)
 - Speciality:** (dropdown menu)
- Agreement Section:**
 - Find | View All | First | 1 of 1 | Last
 - *Agrmt Date:** (empty field)
 - *Agreement Type:** (dropdown menu)
 - *Co:** (empty field with magnifying glass icon)
 - *Agrmt Nbr:** (empty field with + and - buttons)

Vendor Profile page (1 of 2)

 **USA**

☐ **Minority Owned**

Vendor Profile page (2 of 2)

Vendor Type Select a vendor type.

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

(FRA) France

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

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

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

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

(FRA) Certification

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

Certified, Number and Date Select if the government certifies the provider, and then enter the certification number and date.

Specialty Select the provider's area of expertise.

(FRA) Agreement

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

Agrmt Date (agreement date) Enter the date of the agreement between your organization and the training provider.

Agreement Type Select the type of agreement: *Simple*, *Annual*, or *Multi-ann* (multi-annual).

Co (company) Select the provider name from the vendors that you defined in the Vendor table.

Agrmt Nbr (agreement number) Enter the number of the agreement between your organization and the training provider.

(USA) USA

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

See Also

Chapter 12, “(FRA) Producing the French Training Report 2483,” page 189

Entering Vendor Addresses

Access the Address page.

The screenshot displays the 'Vendor Address' page in a web application. At the top, there are two tabs: 'Vendor Profile' and 'Address', with 'Address' being the active tab. Below the tabs, the 'Vendor ID' is listed as 'HXSKY'. A section titled 'Training Cost Estimation' contains a 'Per Unit Cost' field with the value '225.00', a currency dropdown set to 'USD', and a 'Cost Unit' dropdown set to 'Hour'. Below this is the 'Vendor Address' section, which includes a 'Country' dropdown set to 'USA' (with 'United States' as the selected value) and an 'Address' text area containing '13 Orchid Street' and 'Walnut Creek, CA 94323'. To the right of the address text area is a blue link labeled 'Edit Address'. At the bottom of the page is a 'Comments' section with a large text area.

Address page

Training Cost Estimation

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

Cost Unit Select the unit for the vendor cost.

See Also

Chapter 10, “Tracking Training Costs,” Understanding Training Cost Tracking, page 167

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Installing PeopleSoft HRMS,” Administering Country Codes

Entering Vendor Contact Details

Access the Vendor Contact Phone page.

Vendor Contact Phone page

Vendor Contact

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

Contact Phone Numbers

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

Phone Type Select the type of number.

Phone Enter the phone number.

Entering Vendor Contact Addresses

Access the Vendor Contact Address page.

Vendor Contact Address page

Same Address as Vendor

Select if the contact's address is the same as the vendor address that you entered on the Vendor Table - Address page. The system displays the vendor address and makes the address fields unavailable.

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

Setting Up Training Equipment, Materials, and Facilities

This section discusses how to:

- Identify course equipment and materials.
- Enter training facility addresses.
- Enter contact and equipment information.
- Track trainingroom information.
- Enter training facility directions.

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

Page Name	Object Name	Navigation	Usage
Equipment and Materials Table	TRN_EQUIP_TABLE	Enterprise Learning, Define Training Resources, Equipment and Materials, Equipment and Materials table	Identify equipment and materials used for in-house training courses. To ensure that equipment is available where the courses take place, you associate equipment and materials with specific training facilities.
Training Facilities - Address	TRN_FACILITY_TBL1	Enterprise Learning, Define Training Resources, Training Facilities, Address	Record the address of each training facility that your organization uses.
Training Facilities - Contacts and Equipment	TRN_FACILITY_TBL2	Enterprise Learning, Define Training Resources, Training Facilities, Contacts and Equipment	Enter the contact name and telephone number for the training facility and list the available equipment.
Training Facilities - Training Rooms	TRN_FACILITY_TBL4	Enterprise Learning, Define Training Resources, Training Facilities, Training Rooms	Track information about each training room at a facility: location, capacity, cost, and the fixed equipment that is available in the room.
Training Facilities - Directions	TRN_FACILITY_TBL3	Enterprise Learning, Define Training Resources, Training Facilities, Directions	Enter directions to a training facility.

Identifying Course Equipment and Materials

Access the Equipment and Materials Table page.

Equipment and Materials Table

Equipment/Materials Code: K001

***Equipment Type:** Overhead Projector

***Description:** Overhead Projector

Short Description: OHP

Publications

Author:

Year Published:

ISBN:

Equipment and Materials Table page

Equipment Type Select from the available options.

Publications

Author, Year Published, and ISBN Enter bibliographic information in these fields.

Entering Training Facility Addresses

Access the Training Facilities - Address page.

The screenshot shows the 'Training Facilities - Address' page. It features four tabs: 'Address' (active), 'Contacts and Equipment', 'Training Rooms', and 'Directions'. The form includes the following fields and values:

- Training Facility:** HLC001
- Business Unit:** USSVC (with a search icon)
- Location Code:** (empty, with a search icon)
- Facility Name:** Hospital Training Centre
- Short Description:** Hospital
- Mail Drop ID:** (empty)
- Country:** USA (with a search icon) and United States
- Address:** 1234 Broken Arrow Lane, Paynesville, CA 94223 (with an 'Edit Address' link)

Training Facilities - Address page

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

Business Unit Select the business unit that is linked to the training facility.

Location Code If the training facility on company premises, select a location code. You can select only location codes that are assigned to the business unit that you selected.

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

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

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

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

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

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

Country

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

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

Entering Contact and Equipment Information

Access the Training Facilities - Contacts and Equipment page.

The screenshot shows the 'Contacts and Equipment' tab selected. The form includes the following fields and sections:

- Training Facility:** HLC001 Hospital Training Centre
- Business Unit:** USSVC
- Location:**
- Contact Name:** [Text Field]
- Vendor ID:** [Text Field] [Search Icon]
- Contact Phone Numbers:** A table with columns for *Phone Type and Phone. It includes a search icon and navigation buttons (+, -).
- Equipment/Materials Available:** A table with columns for *Equipment/Materials Code, Qty, Per Unit Cost, Currency, and Cost Unit. It includes a search icon and navigation buttons (+, -).

Training Facilities - Contacts and Equipment page

Note. You only need to fill out this page if you use training budgets.

Contact Name

Enter a contact name for the training facility.

Vendor ID

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

Contact Phone Numbers

Phone Type and Phone

Select a phone type and enter the number.

Equipment/Materials Available

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

- Equipment/Materials Code

When you move out of this field, the system displays the equipment name.
- Qty (quantity)

Enter the quantity of each piece of equipment that is available at the training facility.
- Per Unit Cost

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

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

Select a cost unit that is associated with the item.

Tracking Training Room Information

Access the Training Facilities - Training Rooms page.

Address

Contacts and Equipment

Training Rooms

Directions

Training Facility:

HLC001

Hospital Training Centre

Business Unit:

USSVC

Location:

Training Rooms

Find | View All

First

1 of 2

Last

*Room Code:

ROOM1

Room:

H204

+

Building #:

H

Floor #:

2

Per Unit Cost:

0.00

Currency:

USD

Cost Unit:

Maximum Nbr of Students:

25

☒ Room Active

Fixed Equipment/Materials

Find | View All

First

1 of 1

Last

*Equip Code

Quantity

1

+

-

Training Facilities - Training Rooms page

Note. You only need to fill out this page if you use training budgets.

Training Rooms

- Room Code

Each room in a training facility must have a unique room code.
- Building #, (building number) and Floor # (floor number)

Enter the room name, the name or number of the building in which the room is located, and the floor number.
- Per Unit Cost

Enter a per-unit cost for the room.

Cost Unit	Select the cost unit that is associated with the per-unit cost.
Maximum Nbr of Students (maximum number of students)	Enter the maximum number of students that can be accommodated in the room. When you set up a course session, the system checks this field to determine whether the room is large enough for the selected course.
Room Active	Clear this check box if the training room isn't available for training. You can schedule sessions in a room only if Room Active is selected.

Fixed Equipment/Materials

Equip Code (equipment code) and Quantity	Select a code for each item in the training room and the number of each item. Include only fixed equipment that is tied to the room. When you move out of this field, the system displays the item's name.
--	---

Entering Training Facility Directions

Access the Training Facility - Directions page.

The screenshot shows the 'Training Facility - Directions' page. At the top, there is a navigation bar with four tabs: 'Address', 'Contacts and Equipment', 'Training Rooms', and 'Directions'. The 'Directions' tab is currently selected. Below the navigation bar, there are three labeled fields: 'Training Facility:' with the value 'HLC001 Hospital Training Centre', 'Business Unit:' with the value 'USSVC', and 'Description:'. Below these fields is a large text area titled 'Directions' with a vertical scrollbar on the right side, indicating it is a multi-line text input field.

Training Facility - Directions page

You can use the directions that you enter here in the confirmation form letters that you send to students.

See Also

[Chapter 8, “Enrolling and Waitlisting Students,” Administering Training Letters, page 136](#)

Setting Up Course Instructors

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

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

This section discusses how to:

- Add instructors.
- Define courses that an instructor is qualified to teach.
- View instructor competencies.
- View instructor accomplishments.

Pages Used to Set Up Course Instructors

Page Name	Object Name	Navigation	Usage
Instructors - Instructor Profile	TRN_INSTRUCTR_TBL1	Enterprise Learning, Defining Training Resources, Instructors	Add an instructor to the Instructor table.
Instructors - Qualification	TRN_INSTRUCTR_TBL2	Enterprise Learning, Defining Resources, Instructors, Qualification	Define the courses that an instructor is qualified to teach.
Matching Competencies	TRN_MTCH_CMPS_SEC	Click the Matching Competencies link on the Qualification page.	View the instructor's competencies, along with the course requirements. This page helps you determine the instructor's suitability to teach the course.
Matching Accomplishments	TRN_MTCH_ACPS_SEC	Click the Matching Accomplishments link on the Qualification page.	View the instructor's accomplishments, along with the course requirements. This page helps you determine the instructor's suitability to teach the course.

Adding Instructors

Access the Instructors - Instructor Profile page.

Instructor Profile **Qualification**

Instructor ID: HXATEE001 **Boxer, Joe**

***Internal/External:** Internal

Vendor ID:

School Code: **School Name:**

Per Unit Cost: 450.00 USD **Cost Unit:** Pers/Day

Area of Expertise:

Comments:

▼ Mexico

Instructor RFC:

Instructors - Instructor Profile page

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

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

Note. You only need to fill out this page if you use training budgets.

Internal/External	The system populates this field as follows: <i>Internal:</i> Instructor is an employee. <i>External:</i> Instructor is a non-employee.
Vendor ID	Select a vendor ID if the instructor works for a vendor that you added to the Vendor table. If the instructor is internal, this field is unavailable.
School Code and School Name	If the instructor works at a school that you added to the School table, select a school code. When you move out of the field, the system enters the name in the School Name field. To enter a school that isn't in the School table, leave the School Code field blank and enter a name in the School Name field. If the instructor is internal, these fields are unavailable.
Per Unit Cost	Enter the per-unit cost for this instructor. This value is used as the default instructor cost in the course cost setup. The cost for internal instructors appears is automatically populated by the value from the Employee Training Cost page in the Budget Training menu.
Cost Unit	Select a cost unit for the instructor's time.
Area of Expertise	Enter a brief description of the instructor's area of expertise.

Comments

Enter any further comments about the instructor’s area of expertise. You don’t need to specify the courses that the instructor teaches; these are added to the Instructor Table - Qualification page.

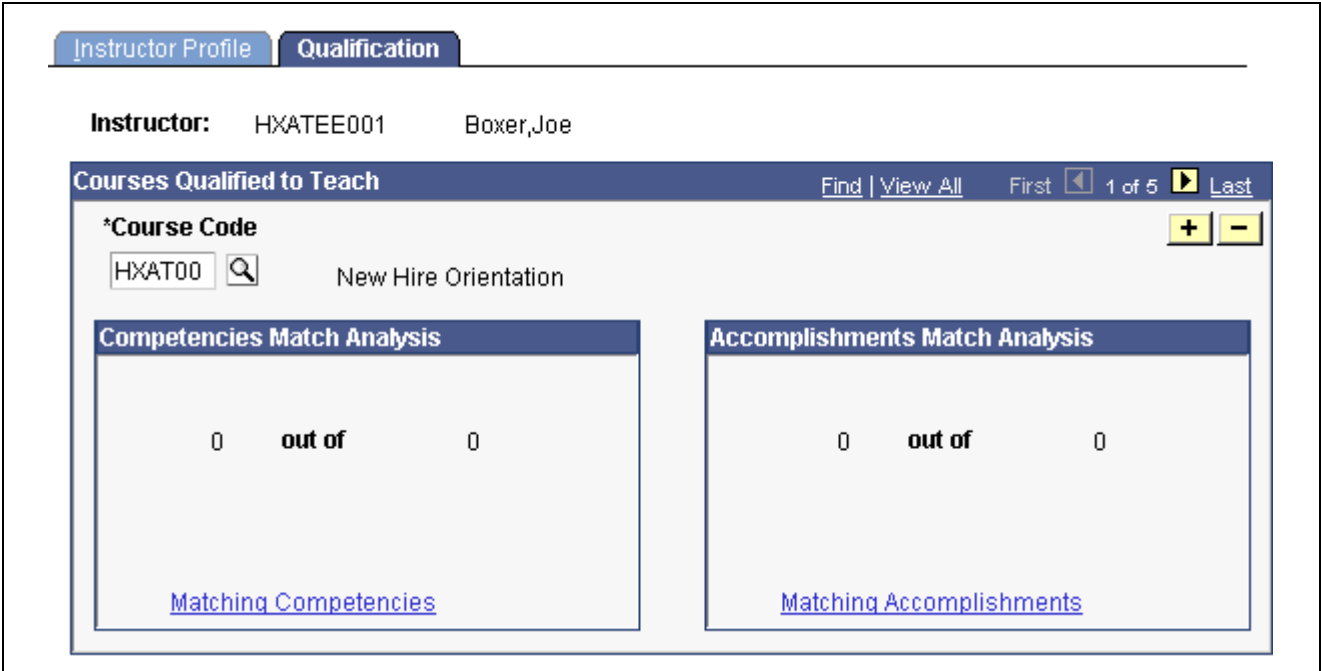
(MEX) Mexico

Instructor RFC

Enter the RFC for the instructor.

Defining Courses That an Instructor Is Qualified to Teach

Access the Instructors - Qualification page.



Instructors - Qualification page

Courses Qualified to Teach

Course Code

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

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

Competencies Match Analysis

If you haven’t set up course competency requirements, the system displays *0 out of 0*.

Matching Competencies

Click to access the Matching Competencies page and view required competencies alongside the instructor’s competencies.

Accomplishments Match Analysis

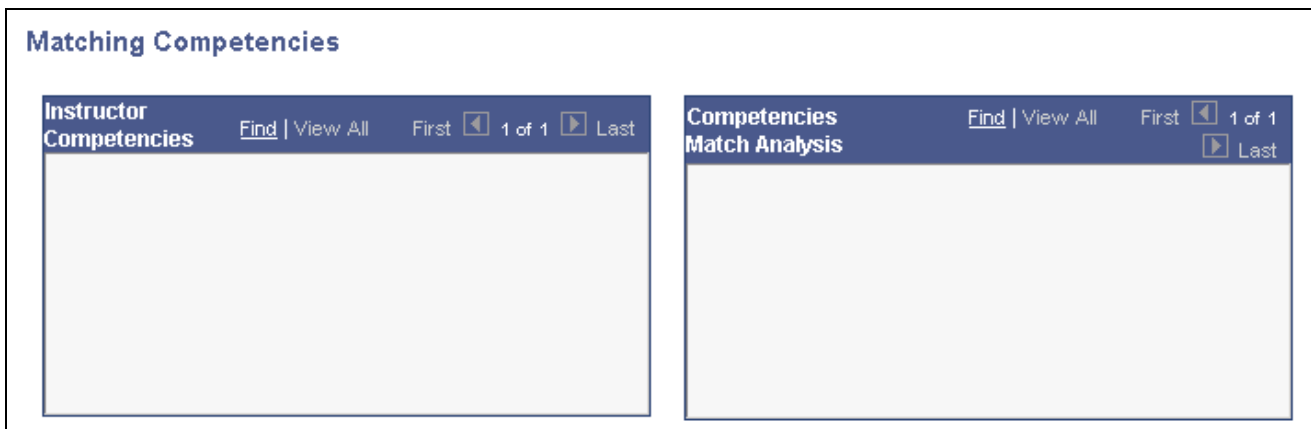
If you haven't set up course accomplishments, the system displays *0 out of 0*.

Matching Accomplishments

Click to access the Matching Accomplishments page and view required accomplishments alongside the instructor's accomplishments.

Viewing Instructor Competencies

Access the Matching Competencies page.



Matching Competencies page

Instructor Competencies

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

Competencies Match Analysis

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, "Tracking Employee Competencies and Accomplishments," Assigning Competencies to Employees

Viewing Instructor Accomplishments

Access the Matching Accomplishments page.

Matching Accomplishments

Instructor Accomplishments

Find | View All

First 1 of 1

Last

Accomplishments Match Analysis

Find | View All

First 1 of 1

Last

Matching Accomplishments page

Instructor Accomplishments

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

Accomplishments Match Analysis

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

See Also

Chapter 7, "Administering Course Sessions," page 111

Overview of Categories and Subcategories

You can classify each course by category and further by subcategory. This organizational structure can help employees find courses and determine training plans.

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

Category	Subcategory	Course Name	Catalog Status
Human Resources	Technical	PeopleTools 1	Active
Human Resources	Technical	PeopleTools 2	Active

Category	Subcategory	Course Name	Catalog Status
Human Resources	Administrative	Supervisory Skills	Active
Human Resources	Administrative	Performance Reviews	Active

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

Note. Every category that you define has an *UNKNOWN* subcategory associated with it.

To make it easier to automatically populate values, the *UNKNOWN* subcategory is at the same level as the category. For example, on the Catalog Cost table, you can populate the table with any courses that are tagged with a category and subcategory value that you identify. This enables you to specify the costs that are associated with similar courses quickly, without having to enter them into the Catalog Cost table one at a time.

Setting Up Course Categories

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

Page Used to Set Up Course Categories

Page Name	Object Name	Navigation	Usage
Category/Subcategory - Category Table	TRN_CATEGORY_TABLE	Set Up HRMS, Product Related, Enterprise Learning, Category/Subcategory, Category Table	Define the course categories that form your training catalog.

Defining Course Categories

Access the Category/Subcategory - Category Table page.

Category Table

Category Code:

COMMUNICTN

*Description:

Communication

Short Description:

Communicatn

Category Table

Customize | Find | View All |  First 1-4 of 4 Last

Description

Duration/Capacity

*Subcategory Code	*Description	Short Description		
AWARENESS	Awareness Communications	Awareness	+	-
INTERPRSNL	Interpersonal Relations	Interprsnl	+	-
PROFESSNL	Professional Communications	Professnl	+	-
UNKNOWN	Unknown	Unknown	+	-

Category/Subcategory - Category Table page

Description Tab

Add a row for each subcategory that you want to add to the category.

Duration/Capacity Tab

Enter the category duration time for the allocated course and the associated unit of time.

Enter the minimum and maximum number of students allowed in the course session.

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

See Also

[Chapter 4, “Defining Training Courses and Programs,” Setting Up Training Catalogs and Programs, page 56](#)

Setting Up Courses

To view a list of defined courses, generate the Course Table report.

This section discusses how to:

- Define general course information.
- Define instructor competencies and accomplishments.
- Designate course prerequisites.
- Define required equipment and materials.

- Specify course classification.
- Specify course content, target audience, and agenda.

Pages Used to Set Up Training Courses

Page Name	Object Name	Navigation	Usage
Courses - Course Profile	COURSE_TABLE1_GBL	Set Up HRMS, Product Related, Enterprise Learning, Courses, Course Profile	Define general course information.
Courses - Required Instr Comps/Accomps (courses required instructor competencies / accomplishments)	COURSE_TABLE6	Set Up HRMS, Product Related, Enterprise Learning, Courses, Required Instr Comps/Accomps	Define competencies and accomplishments that instructors need to teach the course. When you add an instructor to the Instructor table, you can compare the instructor's competency profile with the course requirements before you add the course to the instructor's profile.
Courses - Prereqs, Goals (course table prerequisites, goals)	COURSE_TABLE2	Set Up HRMS, Product Related, Enterprise Learning, Courses, Prereqs, Goals	Specify the courses that a student must complete before taking this course, as well as target skills and certifications. Before using this page, define prerequisite courses and target competencies on the Competencies table.
Courses - Equipment	COURSE_TABLE3	Set Up HRMS, Product Related, Enterprise Learning, Courses, Equipment	Define required equipment and materials. Add this information only for in-house course.
Courses - Catalog	COURSE_TABLE4	Set Up HRMS, Product Related, Enterprise Learning, Courses, Catalog	Specify how courses are classified.
Courses - Description	COURSE_TABLE5	Set Up HRMS, Product Related, Enterprise Learning, Courses, Description	Enter information about course content, target audience, and agenda.

Defining General Course Information

Access the Courses - Course Profile page.

Course Profile		Required Instr Comps/Accomps	Prereqs,Goals	Equipment	Catalog	Description
Course:	2SESS					
Title:	2 Sessions					
Short Title:	2 Ses	*Course Status:	Active			
Creation Date:	01/01/2002	Revision Date:	01/01/2002			
*Internal/External:	Internal	☒ Session Administration				
*Course Type:	Contin Ed	☐ Multilingual Course				
*Primary Delivery Method:	Instructor	☐ Instructor Comps/Accomps Req				
Min/Max Students:	2 6	Cost Unit:	Day			
Duration Time:	2.0	Course Offering:	Monthly			
Course Units:	2.0					
School Code/School:						
France ☐ Chargeable						

Courses - Course Profile page

Title and Short Title

Enter the course title and an abbreviated title.

Course Status

Select from:

Active: The course is currently available, and you can set up a course session.

Inactive: You cannot set up a course session.

Proposed: The course is not yet available. You can't set up a course session.

Creation Date

If you're setting up a new course, the system date (usually today's date) appears by default. You can change it.

Revision Date

Enter a revision date when you make changes to an existing course.

Internal/External

Select *Internal* if the course is held in-house and *External* if the course is held off-site.

Session Administration

Select to administer course sessions using PeopleSoft Human Resources. With Session Administration selected, you can create course sessions, set up waiting lists, enroll students in courses, and send out form letters.

You can select Session Administration for internal and external courses.

Note. If you can't find a session when you're administering course sessions in the Administer Training business process, check to see if Session Administration is selected for the course code, or check to see if the course session is active.

Course Type

Select from:

Contin Ed: Continuing education.

Comp check: Competency check.

Functional

Mgmt Devel: Management development.

Skill Dev: Skill development.

Supv Skill: Supervisory skills.

Technical

Use this field to categorize your courses. It doesn't affect the way that you administer the course in PeopleSoft Human Resources.

Multilingual Course

Select if the course is offered in multiple languages. This check box is available if you selected Session Administration.

Primary Delivery Method

Select from:

Audio: For audio training, such as language tapes.

Computer: For computer-based training.

Instructor: For instructor-led courses.

On-the-Job: For on-the-job training.

Video: For video-based training.

Workbook: For self-taught courses with workbooks.

Instructor Comps/Accomps Req (instructor competencies /accomplishments required)

Select to define a set of instructor competencies and accomplishments for the course. This check box is unavailable if the Primary Delivery Method field value is other than *Instructor*.

Min/Max Students
(minimum/maximum students)

Enter the minimum and maximum number of students that can enroll in the course.

Duration Time

Enter the duration of the course.

Cost Unit

If you completed the Duration Time field, select the unit in which duration time is measured.

Course Units

Enter the number of course units for external courses.

Course Offering

Indicate how often the course is offered.

School Code/School

This field is not available for internal courses.

For external courses, enter details of the school in the School Code or School field.

If the school doesn't have a code, leave the School Code field blank and enter the school name in the School field.

(FRA) France

Chargeable

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

See Also

Chapter 12, “(FRA) Producing the French Training Report 2483,” page 189

Defining Instructor Competencies and Accomplishments

Access the Courses - Required Instr Comps/Accomps page.

Courses - Required Instr Comps/Accomps page

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

Instructor Competencies

Competency

Select a competency to add to the instructor requirements.

Instructor Accomplishments

Accomplishment

Select an accomplishment to add to the instructor requirements.

To add more competencies and accomplishments, insert additional rows.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Setting Up Competencies and Accomplishments,” Understanding Competencies

Specifying Course Prerequisites

Access the Courses - Prereqs, Goals page.

Course Profile	Required Instr Comps/Accomps	Prereqs,Goals	Equipment	Catalog	Description
Course: 2SE88 2 Sessions		Status: Active			
Prerequisite Courses Find First ◀ 1 of 1 ▶ Last					
Q + -					
Target Competencies Find First ◀ 1 of 1 ▶ Last					
Competency		*Proficiency	Grant to EE after Course		
Q		Q	☒ + -		
Target Accomplishments Find First ◀ 1 of 1 ▶ Last					
*License/Certification Code		Grant to EE after Course			
Q		☒ + -			
Target Languages Find First ◀ 1 of 1 ▶ Last					
*Language	Speak	Read	Write	Grant to EE after Course	
Q	Q	Q	Q	☒ + -	

Courses - Prereqs, Goals page

Prerequisite Courses

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

Target Competencies

Competency Select a target competency.

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

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

Target Accomplishments

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

Grant to EE after Course Select to have the system update employee accomplishment profiles upon course completion.

Target Languages

Language	Select a language.
Speak, Read, Write	Select <i>High</i> , <i>Moderate</i> , or <i>Low</i> in each field to indicate the level of proficiency that you expect students to have achieved upon completion of the course.
Grant to EE after Course	Select to have the system update employee accomplishment profiles upon course completion.

Defining Equipment and Materials

Access the Courses - Equipment page.

The screenshot displays the 'Equipment' tab within the 'Courses - Equipment' page. At the top, there are tabs for 'Course Profile', 'Required Instr Comps/Accomps', 'Prereqs,Goals', 'Equipment' (selected), 'Catalog', and 'Description'. Below the tabs, the course information is shown: 'Course: 28ESS', '2 Sessions', and 'Status: Active'. The main section is titled 'Equipment Needed' and includes a search bar with the label '*Equipment/Materials Code' and a magnifying glass icon. To the right of the search bar are '+' and '-' buttons. Below the search bar is a table with one row. The table has a header row with 'Find', 'View All', 'First', '1 of 1', and 'Last' buttons. The table body is currently empty.

Courses - Equipment page

Select the standard equipment/materials code.

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

Specifying Course Classification

Access the Courses - Catalog page.

Course: 28ESS 2 Sessions **Status:** Active

☐ **Not in Catalog**

Catalog		Find View All	First	1 of 1	Last
*Category Code:	UNKNOWN	UNKNOWN			
*Subcategory Code:	UNKNOWN	UNKNOWN			

Courses - Catalog page

Place courses in a catalog to organize training courses into a structure that helps you administer courses more efficiently.

Not in Catalog

Select if you don't want to include the course in the catalog. If selected the Category and Subcategory Code fields are unavailable.

Note. If you've already specified a category or subcategory for a course, and you select this check box, the system clears any category or subcategory information on the page. If you select the check box again later, you have to specify the course category again.

Catalog

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

Category Code and Subcategory Code

To add a course to the catalog, select a category code and a subcategory code.

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

Specifying Course Content, Audience, and Agenda

Access the Courses - Description page.

The screenshot shows a web application interface for defining training courses. The 'Description' tab is active, displaying course information for '2SESS' (2 Sessions, Active status). It includes a 'Description Type' dropdown, an 'Effective Date' field set to '11/06/2002', and a large text area for the 'Description'. Navigation controls for finding and viewing all records are present at the top of the description section.

Courses - Description page

Type

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

Enter an effective date and a description for the selected description type.

Note. The effective date on this page applies only to the description, not to the entire course definition.

Setting Up Training Catalogs and Programs

Using the pages in this section, you can:

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

This section discusses how to:

- View and reorganize courses.
- Create training programs.
- (MEX) Create training and development programs.
- Set up non-course training.

Pages Used to Set Up Training Catalogs and Programs

Page Name	Object Name	Navigation	Usage
Catalog Organization	TRN_CATALOG_MOVE	Set Up HRMS, Product Related, Enterprise Learning, Catalog Organization, Catalog Organization	View courses that are associated with a selected category and subcategory. Reorganize your training catalog by moving courses between categories or subcategories.
Training Program Table	TRN_PROGRAM_TABLE	Set Up HRMS, Product Related, Enterprise Learning, Program Information, Training Program Table	Create a training program.

Viewing and Reorganizing Courses

Access the Catalog Organization page.

Catalog Organization page

Before using this page, set up category and subcategory codes on the Category /Subcategory – Category Table page.

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

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



and

Click to move selected courses from the category in one column to the category in another column.

Creating Training Programs

Access the Training Program Table page.

Training Program Table

Program Code: HREXEC

***Program Status:** Active

***Description:** HR Executive Development

Creation Date: 01/01/1990

Business Unit: PDEV

Owning Dept ID: 10200

Comment: This training program is intended to further enhance the management skills of the managers and senior managers in Human Resources

Short Title: HR Exec

Revision Date:

Training Program					
Sequence	*Course Code	Description	Required		
1	3001		☐	+	-
2	G100		☐	+	-
3	2001		☒	+	-

Training Program Table page

- Pgm Status** (program status) Select *Active* (the default), *Inactive*, or *Proposed*.
- Short Title** Enter an abbreviated description of the training program.
- Creation Date** The default is the system date (usually today's date).
- Revision Date** If you update the program later, enter that date.
- Business Unit** Select the business unit that you want to associate with this training program.
- Owning Dept ID** (owning department ID) Based on the business unit that you selected, select the department that is responsible for maintaining the training program.

Training Program

- Sequence** The system sorts courses by course code. If you want the codes that you select in the Course Code field to appear in a different order, enter sequence numbers in this field to define the order in which students should take courses.
- To view the new order, save your changes and close the page. When you open the page again, the courses appear in the new order.
- Course Code** Select a code for each course in the training program.
- Required** Select if the course is mandatory.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Using PeopleSoft HRMS,” Understanding PeopleSoft HRMS

(MEX) Creating Training and Development Plans

As a company operating in Mexico, you must create training and development plans for your employees. In each plan, you identify courses and events that meet the training and development needs of the workforce.

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

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

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

See Also

Chapter 4, “Defining Training Courses and Programs,” Creating Training Programs, page 58

Setting Up Non-Course Training

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

Use the Non-Course Training table to track training that isn’t course-based.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Using Competencies to Manage Training”

Running Training Course and Training Program Reports

This section discusses training course and program reports.

Pages Used to Run the Reports

Page Name	Object Name	Navigation	Usage
Run Control	PRCSRUNCNTL	Enterprise Learning, Course Reports, Courses, Run Control	The Course Table report (PER703) lists available courses, including course descriptions, type codes, locations, durations, and schools. You can use it to track internal courses and courses offered by outside vendors. This is a Crystal report.
Target Course Certifications	RUNCTL_TRN016	Enterprise Learning, Course Reports, Target Course Certifications	The Target Course Certifications report (TRN016) lists the licenses and certifications that students receive on successful completion of a course. This is a Crystal report.
Course Description	RUNCTL_TRN023	Enterprise Learning, Course Reports, Course Description	The Course Description report (TRN023) lists course descriptions. This is a Crystal report.
Course Category	RUNCTL_TRN024	Enterprise Learning, Course Reports, Course Category	The Course Category report (TRN024) lists training catalog course categories. This is a Crystal report.
Course Equipment	RUNCTL_TRN025	Enterprise Learning, Course Reports, Course Equipment	The Course Equipment report (TRN025) lists the equipment needed for a course. This is a Crystal report.
Course Vendors	RUNCTL_TRN026	Enterprise Learning, Course Reports, Course Vendors	The Course Vendors report (TRN026) lists vendors that are associated with a course on the Course table. This is a Crystal report.
Prerequisite Courses	RUNCTL_TRN027	Enterprise Learning, Course Reports, Prerequisite Courses	The Prerequisites Course report (TRN027) lists prerequisite courses for a course. This is a Crystal report.
Target Qualifications	RUNCTL_TRN028	Enterprise Learning, Course Reports, Target Qualifications	The Target Qualifications report (TRN028) lists the competencies that the course aims to develop or improve. This is a Crystal report.

CHAPTER 5

Defining Training Requirements

This chapter provides an overview of training demand and discusses how to:

- Create demand profiles.
- Set up demand profiles.
- Define profiles by criteria.
- Define global, department, and employee training demand.

Understanding Training Demand

This section lists common elements and discusses:

- Training budgets.
- Demand planning.
- Demand methods.
- Department trees.

Common Elements Used in This Chapter

Creation Date	If you're creating a new department demand, enter the creation date. The default is the system date, which you can change.
Demand ID	The system displays the demand ID that you selected. The system displays <i>NEW</i> when you create a demand for the first time. You can accept the system-generated ID or enter a new ID. The system generates a sequence number based on the last demand ID that was stored in the Installation table.
Demand Priority	Values are <i>Low</i> , <i>Medium</i> , and <i>High</i> . When you're building global scenarios using the Create Global Scenario processes, you can specify that the system include only demands that have a certain demand priority.
Expiration Date	Enter the last possible date for meeting the training demand. This field is for information only, but it can be useful if you decide to mark a demand as obsolete after a specific time.
From Date and Thru Date	Displays the beginning (from) and ending (thru) dates of the budget period, which you entered when you opened the page.

Frozen	Automatically selected if the budget period is frozen. If you try to modify this page, you get a warning message.
OrigEmplID (originating employee ID)	Select the employee ID of the person who created the demand.
Originator	Select the position of the demand's originator. Values are <i>Employee</i> and <i>Supervisor</i>
Revision Date	Enter a revision date when edit a demand profile.

Training Budgets

Use the Budget Training business process to determine the amount of training to provide for your employees.

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

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

Demand Planning

To determine training demand (the number of employees that need to be trained), you build profiles of employees with similar qualities who need to take the same training courses.

You define profiles once and use them whenever you check training demand for a new budget period. You can create and maintain as many profiles as you need.

See Also

[Chapter 5, “Defining Training Requirements,” Setting Up Demand Profiles, page 65](#)

Demand Methods

The Budget Training business process offers four ways to establish training demand, as shown in the following table:

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

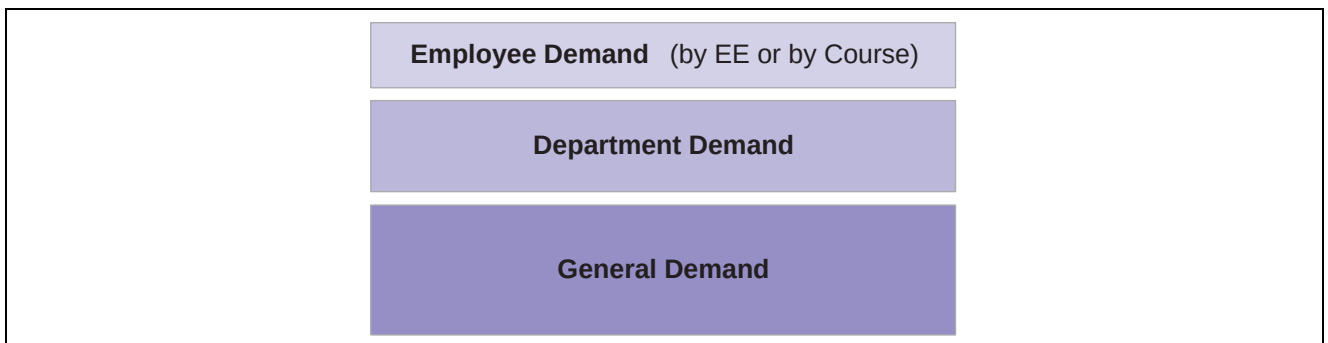
Note. Demand is established for a particular budget period.

Using these methods, you can:

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

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

- Determine the costs that are associated with a demand for training in a particular course—not just how many employees need the training, but the cost to your organization in terms of wages or lost billable time.



Understanding the layers of training needs for your organization

Each method is implemented through a component. For each demand component, you define:

- Who to include when the system calculates the training demand for a course.
- The cost of training the employees for the specified demand.

This cost is either the *average* training cost, if you're working with a general or department demand, or the specific cost per employee, if you're working in the Employee Demand or Employee Demand by Course components.

Department Trees

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

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

Profile Directly

Business Unit: CAN01 **Profile ID:** KCHR **Profile Creation Date:** 06/02/2000

***Description:** Direct Profile for Canada HR

Short Description: DirProf HR

Department Information		Tree	
10000	Human Resources	+	-
14000	Administration	+	-

Job Code

Example page using department tree to populate department



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



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

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



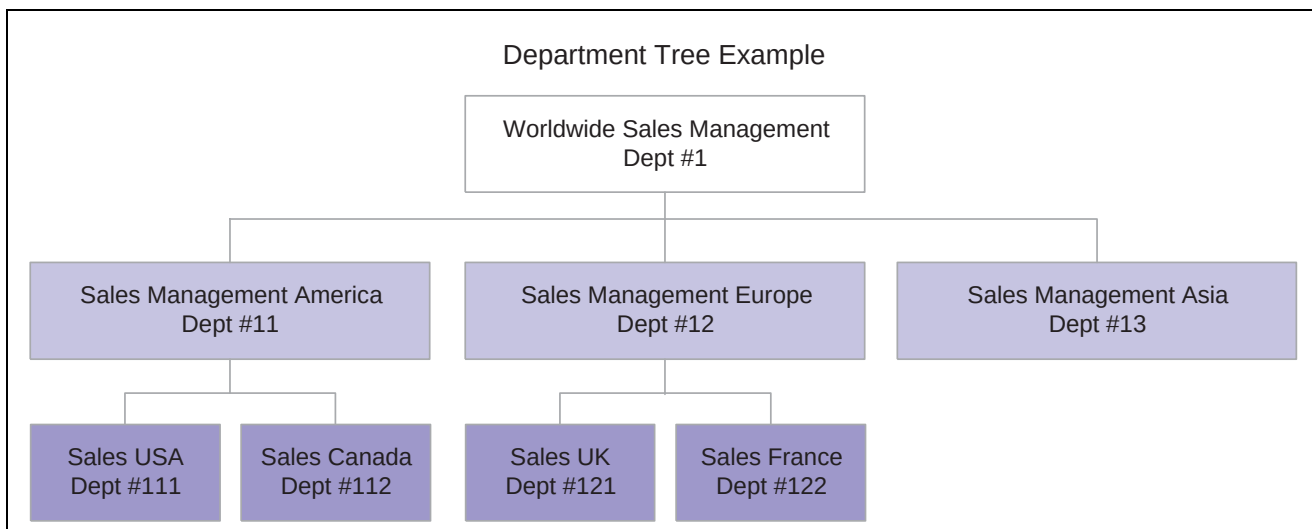
The Tree symbol indicates that you added the department by using the Expand button.



The Person symbol indicates that you added the department manually.

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

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



Expand department tree example

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security"

Creating Demand Profiles

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

By pooling training demand information from department, job code, and competency areas, you can define training needs for an employee group profile. This profile becomes a template that you can reuse as you reassess training demands.

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

Setting Up Demand Profiles

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

- Dynamic

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

- Static

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

This section discusses how to:

- Create dynamic profiles.
- Create static profiles.
- View selection results.
- Run the process to create demand profiles.

Pages Used to Set Up Demand Profiles

Page Name	Object Name	Navigation	Usage
Profile Directly	TRN_PROFILE_CREATE	Enterprise Learning, Training Budget, Create Demand Profiles, Directly, Profile Directly	Create a dynamic profile based on a list of department and job codes.
By Criteria - Profile Criteria	TRN_PROFILE_TABLE	Enterprise Learning, Training Budget, Create Demand Profiles, By Criteria, Profile Criteria	Create a static profile by defining criteria that includes or excludes employees in your training plans. To include competencies in your selection criteria, set up competency codes on the Competency Table Setup page.
By Criteria - Profile Selection	TRN_PROFILE_VIEW	Enterprise Learning, Training Budget, Create Demand Profiles, By Criteria, Profile Selection	View the number of employees selected by department and job codes according to the criteria on the Profile by Criteria - Profile Criteria page.
Create Delayed Profile	RUNCTL_TRN009	Enterprise Learning, Training Budget, Create Demand Profiles, Create Delayed Profile, Create Delayed Profile	Run the process that creates the demand profile, based on the selection criteria that you set up on the Profile By Criteria - Profile Criteria page. Run this process only if you selected the Delayed check box on the Profile Criteria page.

Creating Dynamic Profiles

Access the Profile Directly page.

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

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

Department Select the department to include in your training profile template.

Job Code For the departments that you specified, select the job codes that have training requirements.

See Also

Chapter 5, “Defining Training Requirements,” Department Trees, page 63

Creating Static Profiles

Access the By Criteria - Profile Criteria page.

The screenshot shows the 'By Criteria - Profile Criteria' page. At the top, there are two tabs: 'Profile Criteria' and 'Profile Selection'. Below the tabs, the following information is displayed:

- Business Unit:** CAN01
- Profile ID:** KCGBI
- Profile Creation Date:** 06/02/2000
- ☐ **Delayed**
- *Description:** Canadian Global Business Inst
- Short Description:** CanGBI
- ☐ **Link with Competencies**

Below this information, there are two main sections: 'Include' and 'Exclude'.

Include Section:

- *Criteria #:** 1
- Department:** 10000 (Search icon, +, -, Tree icon, Human Resources)
- Job Code:** (Search icon, +, -)
- Competency:** (Search icon, *Level, +, -)

Exclude Section:

- Department:** (Search icon, +, -, Tree icon)
- Job Code:** 910005 (Search icon, +, -)
- Competency:** (Search icon, *Level, +, -)

By Criteria - Profile Criteria page

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

Description	The system displays the description that you enter here on any pages or reports that reference this profile ID, so your description should identify what this profile does.
Delayed	Select to delay processing the demand profile until later. If this check box is cleared, the system executes the profile criteria when you save the page. Before starting to gather the employees who match your profile template, the system displays a message about the process. Depending on your requirements, this profiling could take some time, so you might consider postponing it. If you postpone this process, you can perform it later by running the Create Delayed Profile process.

Or

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

Criteria # (criteria number)	The system processes your selection criteria statement-based criteria numbers, starting at 1 and moving sequentially through the statement list. When you define a new profile, the system sets the criteria number to 1, to indicate the first criteria statement. Enter a new criteria number to define an additional profile criteria statement.
-------------------------------------	---

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

Competency	Select to include competencies as part of your criteria statement. When selected, the system makes the Competency fields available.
-------------------	---

Include and Exclude

Department and Job Code	Select the department and job code to include in or exclude from the profile.
--------------------------------	---

Competency	Enter the competency to include in or exclude from the profile. Select a competency rating of <i>Level</i>.
-------------------	---

Note. You define competency codes on the Competency table and the associated rating levels on the Rating Model table. When you complete the competency fields, the system includes or excludes workers with competencies at the rating that you specified.

To include both the department that you specify and its child departments in the department tree, use the Expand or Collapse buttons.

Profile Processing Example

In the following example, the selection includes all employees in department KC003, Information Services, who are assigned to job code KC014, Sys Analyst.

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Setting Up Competencies and Accomplishments”

Chapter 5, “Defining Training Requirements,” Department Trees, page 63

Viewing Selection Results

Access the By Criteria - Profile Selection page.

Profile Criteria | **Profile Selection**

Profile ID: KCGBI Canadian Global Business Inst Profile Creation Date: 06/02/2000 [View Selection](#)

Department			Job Code		
Find	View All	First 1 of 1 Last	Find	View All	First 1 of 1 Last
Unit	Department	Nbr Empl	Job Code		Nbr Empl

Total Count		
	0	0

By Criteria - Profile Selection page

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

Profile Creation Date

Displays the date that the system last processed this profile ID. When you rerun the process, the system updates this field.

Nbr Empl (number of employees)

Displays the number of employees that match department profile criteria. If you entered more than one department in the selection criteria, then the system displays the number of matching employees for each department code.

Total Count

Displays the total number of employees that match profile criteria for this profile ID.

Running the Process to Create Demand Profiles

Access the Create Delayed Profile page.

Create Delayed Profile page

Profile ID Select the profile ID from the list of demand profiles that you created on the Profile Criteria page.

Run Click the Run button to calculate the Create Delayed Profile process.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Defining Global, Departmental, and Employee Training Demand

This section discusses how to:

- Define training needs.
- Specify the group that needs training.
- Specify a profile.

- Enter country-specific information for global demand.
- Define the number of employees in a department.
- Specify courses for an employee.
- Enter additional employee demand details.
- Specify employees who require a training course.
- Enter additional employee details by course.

Pages Used to Define Global, Departmental, and Employee Training Demand

Page Name	Object Name	Navigation	Usage
General Demand	TRN_DEMAND_GNRL_1	Enterprise Learning, Training Budget, Identify Training Demand, General Demand, General Demand	View course details and general information about the demand, including priority and originator. To use this page, you must first set up budget periods on the Budget Period Table page.
General Demand - Training Population	TRN_DEMAND_GNRL_2	Enterprise Learning, Training Budget, Identify Training Demand, General Demand, Training Population	Define the group of people who need training in the course that you selected on the General Demand page. You must set up employee training costs and budgets before you can set up training demands.
General Demand - Profile Template	TRN_PROF_TMPLT_SEC	Click the Use Profile as a Template link on the General Demand - Training Population page.	Specify the profile to use to populate the General Demand page.
General Demand - Country	TRN_DPT_DMD_SEC	Click the Human Resources link on the General Demand - Training Population page.	Enter country-specific information for the general demand that you have set up on the Training Population page.
Department Demand	TRN_DEMAND_DEPT	Enterprise Learning, Training Budget, Identify Training Demand, Department Demand, Department Demand	Define the number of employees to be trained in a specific course or set of courses for a particular department during a specified budget period. Set up training costs and budgets before setting up department demands.

Page Name	Object Name	Navigation	Usage
Department Demand - Country	TRN_DPT_DMD_SEC1	Click the Human Resources link on the Department Demand page.	Enter country-specific information for the department demand. The Department Demand - Country page is identical to the General Demand - Country page.
Employee Demand - Employee Demand Profile	TRN_DEMAND_EE_1	Enterprise Learning, Training Budget, Identify Training Demand, Employee Demand	Enter the courses that the selected employee requires during the budget period set up on the Budget Period Table page. Enter audit information for the demand.
Employee Demand -Demand Details	TRN_DEMAND_EE_2	Enterprise Learning, Training Budget, Identify Training Demand, Employee Demand	Enter additional employee demand details, including job code, department, and training costs.
Employee Demand by Course	TRN_DEMAND_EECS_1	Enterprise Learning, Training Budget, Identify Training Demand, Employee Demand by Course	Define the employees who require the selected training course and enter audit information for the demand.
Employee Demand by Course - Demand by Course Details	TRN_DEMAND_EECS_2	Enterprise Learning, Training Budget, Identify Training Demand, Employee Demand by Course, Demand by Course Details	Enter additional employee details by course. For example, an employee will transfer to another department or job code during the budget period, and the training need should be allotted to the new department, then you can account for that change here.

Defining Training Needs

Access the General Demand page.

General Demand		Training Population	
Budget Period:	K1999CALYR	Business Unit:	CAN01
Demand ID:	000001	From Date:	01/01/1999
		Thru Date:	12/31/1999
Course Information			
Category:	COMMUNICTN	Subcategory Code:	PROFESSNL
Course Code:	K005	Professional Presentations	
☐ Not in Catalog			
Demand Information			
*Description:	Professional Presentations	Creation Date:	03/15/1999
Short Description:	Prof Pres	Revision Date:	
Originator:	Employee	Originating Emplid:	
Demand Priority:	Medium	Expiration Date:	

General Demand page

Course Information

Category, Subcat
(subcategory), and **Course**
Code

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

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

Not in Catalog

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

Demand Information

Description and Short
Description

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

See Also

[Chapter 6, "Planning Training Budgets," Freezing Budgets, Moving Unapproved Demands, and Deleting Scenarios, page 105](#)

[Chapter 6, "Planning Training Budgets," Creating Global Scenarios, page 94](#)

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Installing PeopleSoft HRMS," Setting Up Implementation Defaults

Defining the Group That Needs Training

Access the General Demand - Training Population page.

General Demand **Training Population**

Budget Period: K1999CALYR **Business Unit:** CAN01 ☒ **Frozen**

Demand ID: 000001 **From Date:** 01/01/1999 **Thru Date:** 12/31/1999

[Use Profile as a Template](#) **Created:** 03/15/1999 **Revision Date:**

Empl. Training Budgeted Cost: **Currency:** CAD **Unit:** Pers/Month **Compute**

Job Code Find | View All First 1 of 1 Last

Job Code: 600060 Manager-Employee Relations + -

Demand Find | View All First 1 of 1 Last

Department	Tree	Demand
10000 Human Resources	+ -	5

General Demand - Training Population page (1 of 2)

Total General Demand

Total General Demand: <-

Total Count: 5

General Demand - Training Population page (2 of 2)

Establish your total general demand amount and provide additional parameters to calculate the average cost for training employees for this demand. The calculation here determines the employee cost of training and doesn't include the course costs themselves, such as instructor fees and facility costs.

Use Profile as a Template

Click to import the job codes and departments that you previously set up in a profile. The system displays the page where you select the profile.

If you don't enter any job codes or department information on this page, then the calculation is based solely on the profile that you specified.

Empl. Training Budgeted Cost (employee training budgeted cost)

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

Employee Training Budgeted Cost = (Job Code Training Cost × Number of People in This Job Code) for All Job Codes in the Job Code field on This Page / Total Number of People in the General Demand.

Note. You specify the default currency for business units for a budget period on the Budget Period table. Budgets are automatically converted to the default base currency that you establish on the Training Base Currency table. The system converts all training costs to the base currency to calculate training costs.

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

Job Code

Specify the job codes that are included this training demand. When the system calculates the training demand, only employees with the selected job code are considered. The system also uses this job code information to calculate the average cost to train employees for this demand.

Demand

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

To enter country-specific information, click the department name link next to this field.

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

Warning! If you don't enter a demand amount, your computed costs throughout the Budget Training business process will be incorrect. All computed costs are based on these demand amounts.

Total General Demand

Required for each population demand. The system uses this number to calculate the average cost of training employees for this demand.



Click the Summation button to move the sum of the individual department demands to the Total General Demand field. If you change the Demand fields, click this button to update the total general demand before you save the page.

See Also

[Chapter 5, “Defining Training Requirements,” Department Trees, page 63](#)

Specifying a Profile

Access the General Demand - Profile Template page.

Profile Template**Profile Type**
☒ **Directly** ☐ **By Criteria**
Profile ID: 

OK

Cancel

General Demand - Profile Template page

Directly

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

By Criteria

Use this option to select a profile that you created using the Profile by Criteria page. This method is particularly useful for determining which people in your organization need to be trained based on a set of criteria.

OK

When you click OK, the system calculates the training cost using the job codes list selected in the specified profile and the number of people selected for each job code. The system displays the average training cost for the profile population in the Empl. Training Budgeted Cost field on the General Demand page.

Entering Country-Specific Information for Global Demand

Access the General Demand - Country page.

  **France**
Distribution by**Gender**
Female:
Male:
Socio Professional Category
Executive:
Manager:
Office Worker:
Qualified Worker:
Non Qualified Worker:

General Demand - Country page

(FRA) France

Define how your training demand divides by gender and professional category. The sums of the entries in the two regions on this page must equal the total general demand that you specified on the Training Population page.

Gender

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

Socio Professional Category

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

Defining the Number of Employees in a Department

Access the Department Demand page.

Department Demand

Budget Period: K1999CALYR

Business Unit: CAN01

DeptID: 10000

☒ Frozen

Department Information

Find | View All First 1 of 1 Last

Course Information

Category: COMMUNICTN

Subcategory Code: PROFESSNL

☐ Not in Catalog

Course Code: K005

Professional Presentations

Demand ID: 000001

Creation Date: 03/15/1999

Revision Date:

*Description: Professional Presentations

Short Description: Prof Pres

Demand: 5

Originator: Employee

Originating Emplid:

Demand Priority: Medium

Expiration Date:

Employee Cost: 11.91

Currency: CAD

Cost Unit: Pers/Month

Job Code

Find | View All First 1 of 1 Last

600060

Manager-Employee Relations

Department Demand page

Course Information

Specify the course for this training demand. If you don't know the category, subcategory, or course code, use the system default *UNKNOWN*. To add another course, insert an additional data row.

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Not in Catalog	Select if the training course isn't defined in the Catalog table.
Demand	Enter the number of employees in the selected department that need to take the training course.
Employee Cost	Enter the employee training cost and the currency it is tracked in. This cost is used during the simulation for pricing the scenarios and the training plan. You specify the default currency for business units for a budget period on the Budget Period Table page. Budgets are automatically converted to the default base currency that you establish on the Base Currency page.
Cost Unit	Select the cost unit that is associated with the amount in the Employee Cost field.
Job Code	Before calculating employee cost, you can select one or more job codes to use when calculating the average employee cost for training for this demand. When you select job codes here, the system uses the Job Code Training Cost amount on the Job Code Training Cost table to calculate the employee training cost. The system takes an average of the costs for all job codes that you specify.

See Also

Chapter 6, "Planning Training Budgets," Creating Global Scenarios, page 94

Specifying Courses for an Employee

Access the Employee Demand Profile page.

Employee Demand Profile

Demand Details

Budget Period:

K1999CALYR

Business Unit:

CAN01

☒ Frozen

EmplID:

KC0001

Griffiths,Martina Rae

Employee Demand Information

Find | View All

First 1 of 1 Last

+ -

Creation Date:

02/07/1999

Revision Date:

From Date:

01/01/1999

Demand ID:

000012

Empl Rcd Nbr:

0

Thru Date:

12/31/1999

*Description:

Griffiths,Martina Rae

Short Desc:

Griffiths

Originator:

Supervisor

Originating Emplid:

KU0005

Demand Priority:

Medium

Expiration Date:

Course Information

Category:

MANAGEMENT

Subcategory:

CAREER DEV

☐ Not in Catalog

Course Code:

K003

Performance Management

Employee Demand Profile page

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

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

Category, Subcat
(subcategory) and **Course**
Code

If you aren't sure which course this demand is for, select the category and subcategory codes and leave the course code blank.

Note. You cannot select a subcategory until you've selected a category.

Not in Catalog

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

See Also

Chapter 6, "Planning Training Budgets," Creating Global Scenarios, page 94

Entering Additional Employee Demand Details

Access the Demand Details page.

Employee Demand Profile		Demand Details	
Budget Period:	K1999CALYR	Business Unit:	CAN01
EmplID:	KC0001	Griffiths, Martina Rae	
Employee Demand Information		Find View All First 1 of 1 Last	
Creation Date:	02/07/1999	Revision Date:	
Demand ID:	000012	From Date:	01/01/1999
Job Code:	800010	Thru Date:	12/31/1999
Department:	10000	Empl Rcd Nbr:	0
Unit Cost:	13.00		
*Job Code:		800010 Secretary-Senior	
*Department:		10000 Human Resources	
Empl. Training Budgeted Cost:	23.00	Currency:	CAD
		Unit:	Pers/Month

Demand Details page

Job Code, Department,
and Empl. Training
Budgeted Cost

The system populates these fields from the employee's job data. For budget purposes, you can select a job code, department, or employee training budgeted cost if it is different from the values that are currently defined for this employee. You might do this the employee details will be different in the future period. For example, the employee may be transferring to another department and job with a different employee training budgeted cost.

For Empl. Training Budgeted Cost, indicate the currency that the cost is tracked in.

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

Unit

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

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

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

See Also

Chapter 3, "Setting Up Training Costs," Setting Up Training Cost Currency, page 13

Specifying Employees Who Require a Training Course

Access the Employee Demand by Course page.

The screenshot displays the 'Employee Demand by Course' page. At the top, there are tabs for 'Employee Demand by Course' and 'Demand by Course Details'. Below the tabs, the following information is displayed:

- Budget Period:** K1999CALYR
- Business Unit:** CAN01
- Category:** MANAGEMENT
- Subcategory Code:** CAREER DEV
- Course Code:** K003
- Performance Management**
- Frozen** (checked)
- Not in Catalog** (unchecked)

Below this information is a table titled 'Employee Demand' with columns for 'Find', 'View All', 'First', '1 of 2', and 'Last'. The table contains the following data:

Creation Date:	Revision Date:	From Date:	Thru Date:
02/07/1999		01/01/1999	12/31/1999
Demand ID: 000012			
EmplID: KC0001	Griffiths, Martina Rae	Empl Rcd Nbr: 0	
Job Code: 800010	Secretary-Senior		
Department: 10000	Human Resources		
Unit Cost: 13.00	CAD	STUD/D	

Below the table, there are input fields for:

- *Job Code:** 800010 (with a search icon)
- *Department:** 10000 (with a search icon)
- Empl. Training Budgeted Cost:** 23.00 (with a search icon)
- Unit:** Pers/Month (with a dropdown arrow)

Employee Demand by Course page

Not in Catalog

Selected by default if the training course hasn't been defined in the Catalog table.

EmplID (employee ID)

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

Entering Additional Employee Details by Course

Access the Demand by Course Details page.

Employee Demand by Course		Demand by Course Details	
Budget Period:	K1999CALYR	Business Unit:	CAN01
Category:	MANAGEMENT	Subcategory Code:	CAREER DEV
Course Code:	K003	Performance Management	
		☒ Frozen	
		☐ Not in Catalog	
Employee Demand			
Find View All First 1 of 2 Last			
Creation Date:	02/07/1999	Revision Date:	
Demand ID:	000012	From Date:	01/01/1999
EmplID:	KC0001	Thru Date:	12/31/1999
Job Code:	800010	Empl Rcd Nbr:	0
Department:	10000		
Unit Cost:	13.00		
Griffiths, Martina Rae			
Secretary-Senior			
Human Resources			
CAD STUD/D			
*Job Code:	800010		Secretary-Senior
*Department:	10000		Human Resources
Empl. Training Budgeted Cost:	23.00	CAD	Unit: Pers/Month

Demand by Course Details page

Job Code and Department

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

Unit

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

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

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

Note. You specify the default currency for business units for a budget period on the Budget Period table. Budgets are automatically converted to the default base currency that you establish on the Training Base Currency table (TRN_BASE_CURRENCY).

CHAPTER 6

Planning Training Budgets

This chapter provides an overview of the training budget planning process and discusses how to:

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

Understanding the Training Budget Planning Process

This section lists common elements and discusses:

- Budget scenarios.
- The scenario process.

Common Elements Used in This Chapter

Active New Scenario	Select to make the scenario active.
Note. Only one scenario can be active for each budget period and business unit, though you can have multiple scenarios.	
New Scenario	Enter the name of your new scenario. The name can be up to ten characters.
Not in Catalog	Select if the course isn't in the Catalog table.
Sort by	To change the order in which information is listed, select one of these values: <i>Demand:</i> Sorts demands by the number of requested demands. <i>Approved:</i> Sorts demands according to the number entered in the Approved field.

Budget Scenarios

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

You can use the scenarios that are provided in PeopleSoft Human Resources to help plan budgets, approve demands, and track and freeze budgets. You can define multiple scenarios.

Using budget scenarios, you can:

- Set the level of employee demand that you can afford during a budget period.
- Perform what-if analyses to determine the best budget plan.
- Simulate the effect of one plan against another.
- Activate the plan that best meets training demands and budgets.

This plan defines the training plan for the related period.

The Scenario Process

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

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

Working With Department and Global Scenarios

You create new scenarios by starting from an active scenario at the department level or by combining all active department scenarios into a global scenario for your organization. This provides an overview of training demand, costs, and budget.

Using department-level scenarios works best for large organizations with separate budgets for each department. More centralized or smaller organizations may find that global scenarios are more efficient.

You can narrow the scope of the training demand that the system includes in the training plan, either at each department level or at the global level.

Freezing Scenarios

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

Calculating Training Element Costs

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

- COURSE_TBL
- CRSE_SESS_FACIL
- CRSE_SESS_INSTR
- CRSE_SESSN_COST
- CRSE_SESSN_TBL

- TRN_INSTR_COST
- TRN_CST_ELEMENT

The training element costs are then associated with a course or a catalog element that specifies the duration, in hours, days, or weeks, and so on, for a course. The catalog element also specifies the maximum number of students who can enroll in the course.

When you enter a course cost, the system calculates the cost by element for that course and stores the cost on the Cost Element table. These amounts are ready to use in the Adjust Department Demand component. The system also converts the cost to the base currency that is specified for the business unit in the Budget Period table.

Sessions and cost units affect the computed cost calculation through the session padding factor.

Using Session Padding to Determine Session Demand

When you define course and catalog costs, you enter a cost unit for each per-unit cost. The cost unit specifies how the cost is computed. Cost units can be categorized into four groups:

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

While cost and duration aren't student-dependent, the number of course sessions to accommodate your estimated training needs must be included in the cost formula. The system needs the number of students by course (or by category and subcategory) to calculate the cost.

However, budgeting costs by using the number of students that are specified by demand is not reliable, because this information is based on an *estimated* number of students.

For example, a maximum of ten students is allowed in a course session, and you plan to train five students.

1. You add five students to your budget plan.

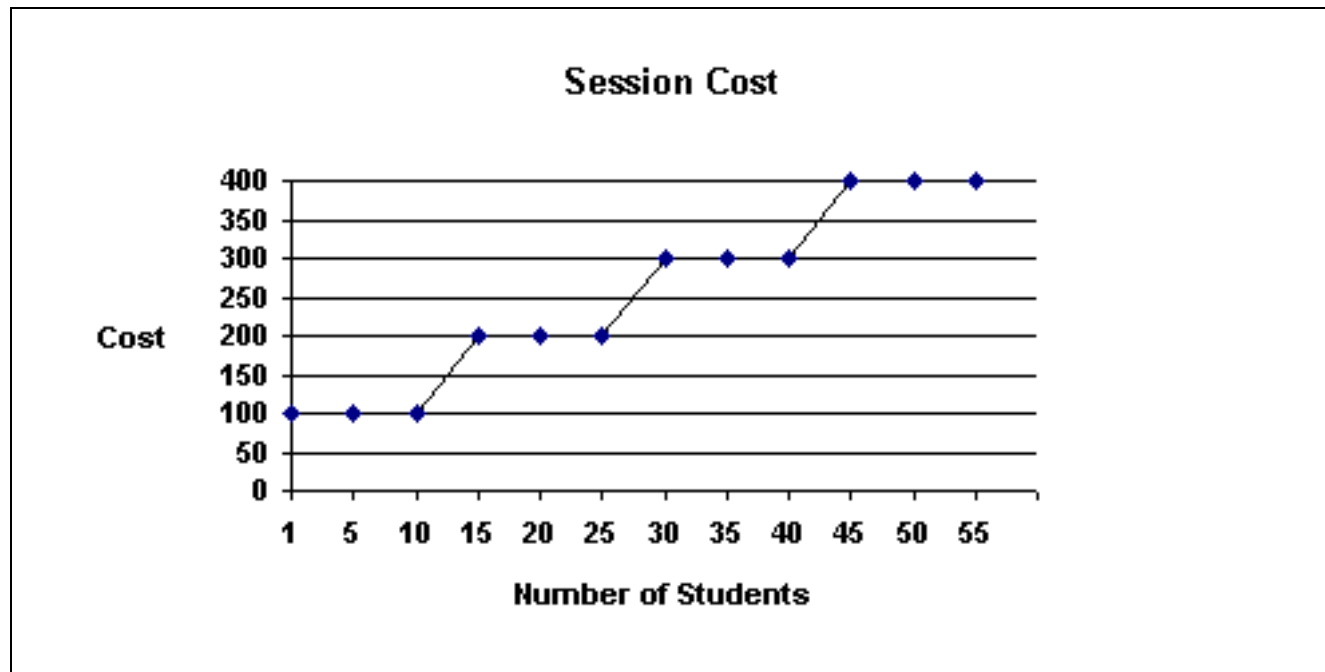
The training cost doesn't change.

2. You add another student to the demand.

The training cost doubles.

Based on your current information, the computed training cost can differ dramatically due to a minor change in just one variable. However, because this information is an estimate, it isn't reliable.

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

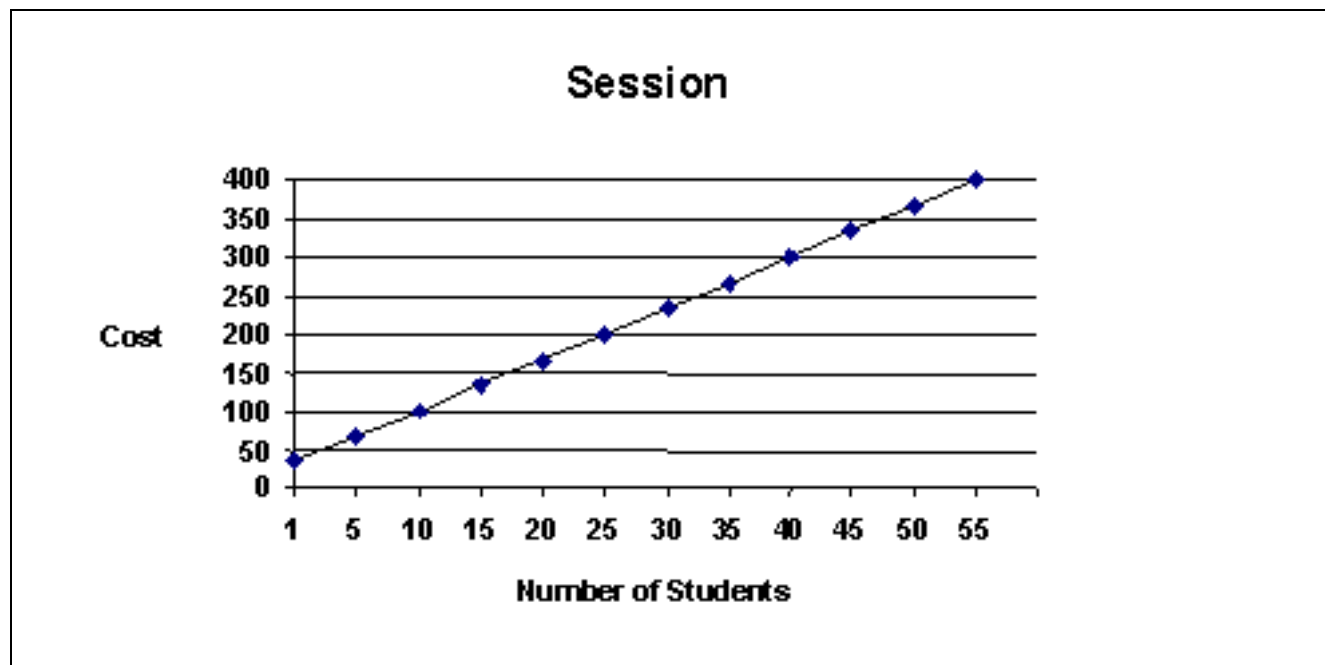


Relationship of cost to the expected number of students that need to take a course.

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

Number of students planned / Maximum number of students per course

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



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

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

Using Cost Units in Budget Cost Calculations

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

Cost Unit	Cost Computation Detail
None	Not possible: you must always provide a cost unit with a cost amount.
Km (kilometers)	These costs are converted directly to the base currency.
Flat Cost	Converted to the base currency and then multiplied by the session padding factor.
Hour	Converted to the base currency, multiplied by the course duration, and then multiplied by the session padding factor.
Day	Converted to the base currency, multiplied by the course duration, multiplied by the day annuity factor, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Week	Converted to the base currency, multiplied by the course duration, multiplied by the week annuity factor, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Month	Converted to the base currency, multiplied by the course duration, multiplied by the month annuity factor, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Year	Converted to the base currency, multiplied by the course duration, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Pers/Hr (person/hour)	Converted to the base currency, multiplied by the number of demands, and multiplied by the course duration.
Pers/Day (person/day)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, and then divided by 8 (number of hours in a business day).
Pers/Week (person/week)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, divided by 8 (number of hours in a business day), and then divided by 5 (number of days in a standard work week).
Pers/Month (person/month)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, multiplied by the month annuity factor, and divided by the hourly annuity factor.

Cost Unit	Cost Computation Detail
Pers/Year (person/year)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, and then divided by the hourly annuity factor.
Pers/Train (person /training)	Converted to the base currency and multiplied by the number of demands.

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

See Also

Chapter 6, “Planning Training Budgets,” Freezing Budgets, Moving Unapproved Demands, and Deleting Scenarios, page 105

Chapter 3, “Setting Up Training Costs,” Setting Up Training Cost Currency, page 13

Creating Department Scenarios

Using the Adjust Department Demand component, you can:

- Create budget plan scenarios for a particular period.
You work on training budget scenarios one department at a time. The first time that you adjust department demand, the system generates a scenario that is based on the demands that you set up. As you adjust the demand further, you create new scenarios.
- Calculate computed costs of training and compare them to the budgeted amount for a scenario.
- Determine how many employees the department can afford to train during a specified budget period.

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

This section discusses how to:

- Develop training plan scenarios.
- Enter country-specific department information.
- Review training component cost details.

See Also

Chapter 5, “Defining Training Requirements,” Defining Global, Departmental, and Employee Training Demand, page 70

Pages Used to Create Department Scenarios

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

Developing Training Plan Scenarios

Adjust Department Demand - Demands page

Demands **Costs Details**

Budget Period: K1999CALYR **Business Unit:** CAN01 **Department:** 10000 HR

Scenarios Find | View All First 1 of 4 Last

*Scenario: BASE ☐ Active Scenario Demand Sort: Approved + -

Budget Period Details Find | View All First 1-3 of 3 Last

Inside Department					All Departments	
Demand ID		Priority	Approved	Demand	Approved	Demand
000001	Professional Presentations	2	5	5	5	10
000012	Griffiths, Martina Rae	2	1	1	1	1
000013	Saint-Amand, Marcel	2	1	1	1	1
Total						
					Refresh	7 7 7 12

Adjust Department Demand - Demands page (1 of 2)

Budget / Costs

Budget Amount: 2170.00 **Currency:** CAD **Ratio:** 66.22 % **Computed Cost:** 1436.944

Adjust Department Demand - Demands page (2 of 2)

Scenario	Indicates the scenario on which the simulation is being performed. The system creates an initial base scenario when you first open this page. Insert new scenarios for the department if necessary. The system makes the Scenario field unavailable if the budget period is frozen.
Active Scenario	If this scenario is the active scenario, this check box is selected by default. The training plan is the combination of all active scenarios from all concerned departments, so only one scenario at a time can be active for each budget period, business unit, and department, although you can have multiple scenarios in your system. Once you’ve created scenarios in this component, you can activate a scenario on the Choose Active Scenario page.
Demand Sort	To change the order in which demands are listed, select a sort order: <i>Demand:</i> Sorts by demand ID. <i>Approved:</i> Sorts according to the number that you enter in the Approved field. <i>Priority:</i> Sorts by the priority that you specified on the demand pages.

Inside Department

The system builds scenarios using all training demand that is associated with the selected business unit, budget period, and department. The system also displays associated employee demand.

Note. An employee or department can be included in different training demands, because category, subcategory, and course code generate demand.

Demand ID	Displays the demand ID and its description. The symbol next to the Demand ID field indicates the type of demand.
-----------	--



An employee demand.



A global demand.

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

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

- 1: High priority.
- 2: Medium priority.
- 3: Low priority.

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

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

Click the Refresh button to adjust total or summary amounts.

Demand

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

All Departments**Approved**

Displays the number of approved demands for the specified budget period for all departments, not just for the one that you're working with on this page.

Demand

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

Total

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

Budget/Costs

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

Budget Amount

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

Computed Cost

The system calculates the cost of the training for the department based on the approved demands.

Entering Country-Specific Department Information

Access the Country page.



The screenshot shows a web interface for France. At the top, there is a dropdown menu with the French flag and the text 'France'. Below this is a section titled 'Distribution by' with a blue header. Under this header, there are two sub-sections: 'Gender' and 'Socio Professional Category'. The 'Gender' section has two rows: 'Female:' and 'Male:', each followed by an empty text input box. The 'Socio Professional Category' section has five rows: 'Executive:', 'Manager:', 'Office Worker:', 'Qualified Worker:', and 'Non Qualified Worker:', each followed by an empty text input box.

Country page

(FRA) France

Define how your training demand divides by gender and professional category. The sums of the entries on this page must equal the total general demand that you specified on the Adjust Department Demand - Demands page.

Gender

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

Socio Professional Category

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

You can print a training plan distribution report that shows how your training demands are distributed by gender and professional category.

Viewing Training Component Costs

Access the Adjust Department Demand - Costs Details page.

Demands
Costs Details

Budget Period: K1999CALYR **Business Unit:** CAN01 **Department:** 10000 HR

Scenarios
Find | View All
First 1 of 4 Last

***Scenario:**
Refresh
Cost Source:
+ -

Scenario Detail
Find | View All
First 1-3 of 3 Last

Demand ID		Approved	Computed Cost
000001	Professional Presentations	5	0.000
000012	Griffiths, Martina Rae	1	0.000
000013	Saint-Amand, Marcel	1	0.000

Budget / Costs

Budget Amount: 2170.00 **Currency:** CAD **Ratio:** 0.00 % **Computed Cost:** 0.000

Adjust Department Demand - Cost Details page

Scenarios

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

Cost Source Select a cost source to view a breakdown of the costs for a particular training component. Values are *Equipment*, *Expense*, *Facility*, *Vendor*, *Instructor*, *Salary Cost*, and *Total Cost*.

For example, if you select *Equipment*, the system displays the cost of equipment for each demand ID and compares the total equipment cost for all demand IDs to the budget period budget amount and the percentage of the budget that is represented by equipment costs.

Demand ID For each demand ID, the system displays the approved demand and computed cost for the cost type that is specified in the Cost Source field.

Budget/Costs

Compare the budget amount to the computed cost for each training element or to the total cost of all elements.

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

Creating Global Scenarios

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

Options for creating global scenarios:

- Using selection criteria.
- Copying existing scenarios.

Note. Global scenarios are specific to budget periods and business units, but they include all departments within the business unit that you specify when you create the global scenario.

This section discusses how to:

- Include and exclude departments, job codes, and competencies.
- Write selection criteria.
- Create scenarios by copying an existing scenario.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Pages Used to Create Global Scenarios

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

Including and Excluding Departments, Job Codes, and Competencies

Access the Create Scenario by Criteria - Criteria 1 page.

Criteria 1 Criteria 2

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) **Run**

Budget Period: Business Unit: New Scenario:

Or [Find](#) | [View All](#) First 1 of 1 Last

*Criteria #: 1 ☐ Active New Scenario ☐ Link with Competencies

Create Scenario by Criteria - Criteria 1 page (1 of 3)

Include

Department [Find](#) | [View All](#) First 1 of 1 Last

Tree **+** **-**

Job Code [Find](#) | [View All](#) First 1 of 1 Last

Competency [Find](#) | [View All](#) First 1 of 1 Last

*Level **+** **-**

Create Scenario by Criteria - Criteria 1 page (2 of 3)

Exclude

Department [Find](#) | [View All](#) First 1 of 1 Last

Tree **+** **-**

Job Code [Find](#) | [View All](#) First 1 of 1 Last

Competency [Find](#) | [View All](#) First 1 of 1 Last

*Level **+** **-**

Create Scenario by Criteria - Criteria 1 page (3 of 3)

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

Or

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

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

To reorganize a series of statements, update the Criteria # fields and save the page. When you reopen the page, the system displays the statements in the appropriate order.

Link with Competencies	Select to include competencies as part of your criteria statement. The system makes the Competency fields available.
Competency	Select the competency and select a competency rating in the Level field. You define competency codes on the Competency table and the associated rating levels on the Rating Model table. When you complete the Competency fields, the system includes or excludes workers with competencies at the rating that you specified.

Enter a new criteria number to define additional profile criteria statements.

Include

Department, Job Code, and Competency	Select the department, job code, and competency to include in the scenario.
---	---

To include both the department and its child departments in the department tree, use one of the buttons below the tree.



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



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

Exclude

Department, Job Code, and Competency	Select the department, job code, and competency to exclude from the scenario. Use the Expand and Collapse buttons to add or remove departments from your department tree.
---	---

Note. You can select only departments that are associated with the business unit that you associated with the new global scenario in the Business Unit field.

Criteria Statement Example

In the following example, the selection includes employees in department 10000 who are assigned to job code 140055, Payroll Analyst.

In the same selection criteria statement, you can exclude employees with a high rating (level 5) in competency 4020, Interview, as follows:

Note. You can decide *not* to enter a department, job code, or competency in a criteria statement. For example, if you don't specify a job code in the Exclude criteria statement, the system excludes any employee in department 10000 with an expert rating in competency 4020.

See Also

Chapter 5, “Defining Training Requirements,” Department Trees, page 63

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Setting Up Competencies and Accomplishments”

Writing Selection Criteria

Access the Create Scenario by Criteria - Criteria 2 page.

Create Scenario by Criteria - Criteria 2 page

For each demand selection statement (criteria number) that you defined on the Create Scenario by Criteria - Criteria 1 page, enter the courses to include or exclude from the global scenario.

Category, Subcat, (subcategory), and Course Code In the Course Code fields, select a course that is associated with the selected category and subcategory.

To calculate costs for the courses that are not in your catalog, the costs for the course (such as vendor, instructor, and facility costs) need to be stored in the Course Cost table.

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

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Creating Scenarios by Copying An Existing Scenario

Access the Create Global Scenario page.

Create Global Scenario page

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

Scenario Type

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

Global If you select Global, select an existing global scenario as the source for the new scenario.

Note. If the budget period that you specified is frozen, you cannot make the global scenario that you're defining here the active scenario.

General Demand

Increase Approved by Factor

Enter a multiplier:

- To reduce the total number of approved general demands, enter a value of less than 1.
- To increase the total number of approved general demands, enter a value of more than 1.
- To keep the total number of approved general demands as they are in the source scenario, enter 1.

For example, if you enter .75, and your source scenario specifies 100 approved demands, then the new global scenario will have 75 approved demands after the build process.

To double your approved demands, enter 2. The result will be 200 approved demands in your new scenario.

Individual Demand

Specify employee demands to include in your new global scenario.

All Demands	Select to copy existing employee demands.
Approve	Select to copy approved demands to the new scenario.
higher than Priority	If you select Approve, select a priority in this field to copy approved demands that are higher than the selected priority. Values are <i>Low</i>, <i>Medium</i>, and <i>High</i>. For example, if you select <i>Low</i>, the system includes all <i>Medium</i> and <i>High</i> priority demands.
Unapprove	Select to copy employee demands that are unapproved. Unapproved demands have an approved headcount of 0, even though there is a requested demand headcount for the demand ID.
less than priority	If you select Unapprove, select a priority for copying unapproved demands that are lower than the selected priority.

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

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Activating Scenarios and Viewing Summaries

This section discusses how to:

- Activate scenarios.
- View cost details.
- View demand details.

Pages Used to Activate Scenarios and View Summaries

Page Name	Object Name	Navigation	Usage
Choose Active Scenario	TRN_ADJ_SCE_TABLE	Enterprise Learning, Training Budget, Create Budget Plan, Choose Active Scenario, Choose Active Scenario	Select a scenario to activate. You can only work with the active scenario on the Adjust Department Demand component.
Scenario List	TRN_LST_SCE_TABLE	Enterprise Learning, Training Budget, Create Budget Plan, Active Global Scenario, Scenario List	Make a global scenario your active scenario for a budget period and business unit.
Review Active Scenarios - Apprvls- Approved by Demands	TRN_ADJ_DEP_TABLE	Enterprise Learning, Training Budget, Create Budget Plan, Review Active Scenarios -Apprvls, Approved by Demands	View approved demands for the active scenario.
Summarize Active Scenario - Total Costs	TRN_SML_DEP_TABLE	Enterprise Learning, Training Budget, Create Budget Plan, Summarize Active Scenario, Total Costs	View cost details and the total cost of the active scenario.
Summarize Active Scenario - Demands	TRN_SML_DEM_TABLE	Enterprise Learning, Training Budget, Create Budget Plan, Summarize Active Scenario, Demands	View summary information about demands that are associated with the active scenario. You can obtain a printed report of the information by running the Active Scenario Summary report.
Summarize Global Scenario - Total Costs	TRN_SML_DEPG_TABLE	Enterprise Learning, Training Budget, Create Budget Plan, Summarize Global Scenario, Total Costs	View cost details and the total cost of a global scenario.
Summarize Global Scenario - Demands	TRN_SML_DEMG_TABLE	Enterprise Learning, Training Budget, Create Budget Plan, Summarize Global Scenario, Demands	View summary information about demands that are associated with a global scenario. You can obtain a printed report of the information by running the Active Scenario Summary report.

Activating Scenarios

Access the Choose Active Scenario page.

Choose Active Scenario

Budget Period: K1999CALYR

Business Unit: CAN01

Department: 10000

HR

Scenarios				Find View All	First	1-4 of 4	Last
Scenario	Approved	Ratio	Computed Cost				
BASE	1	0.00%	0.000	☐			Active Scenario
GBLCAN1	1	0.00%	0.000	☐			Active Scenario
KGBLCAN2	1	0.00%	0.000	☒			Active Scenario
KGBLCAN3	1	0.00%	0.000	☐			Active Scenario

Budget Amount

2170.00 CAD

Refresh

Choose Active Scenario page

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

Viewing Cost Details

Access the Summarize Active Scenario - Total Costs page.

Total Costs

Demands

Budget Period:

K1999CALYR

Business Unit:

CAN01

Base Currency:

CAD

Costs per department

Find

View All

First

1-3 of 3

Last

Department	Approved	Budget	Ratio	Computed Cost
10000 Human Resources	8	2170.00	75.77 %	1644.13
11000 Information Systems	8	3590.00	67.17 %	2411.38
14000 Administration	19	778.00	77.65 %	604.15

Budget / Costs

35

6538.00

71.27 %

4659.65

Summarize Active Scenario - Total Costs page

This page displays the cost detail for the active scenario sorted by department. For each department, the system displays the department ID and description, and the number of employees that you approved for the training on the Adjust Department Demand - Demands page.

The system populates the department budget amount from the Department Budget table and the current computed cost from the Adjust Department Demand - Cost Details page. The ratio shows the percentage of the department budget amount to the current computed cost for the approved demands. You can quickly determine whether one department is over or under budget.

The Budget/Costs region displays the total of the approved employee demands for all departments included in the active scenario. The system displays your total training budget for all departments and your current total computed cost. The ratio indicates whether your current computed costs are over or under budget.

Viewing Demand Details

Access the Summarize Active Scenario - Demands page.

Total Costs		Demands				
Budget Period:		K1999CALYR	Business Unit:	CAN01	Base Currency:	CAD
Demands						
Find View All			First 1-6 of 6 Last			
Demand ID		Approved	Demand			
	000001	Professional Presentations	6	10		
	000009	PeopleSoft HRMS	7	4		
	000010	Gender Communication	19	8		
	000011	Davies,Craig R	1	1		
	000012	Griffiths,Martina Rae	1	1		
	000013	Saint-Amand,Marcel	1	1		
Total			35	25		

Summarize Active Scenario - Demands page

Demand ID Displays the demand ID and its description. The symbol next to the Demand ID field indicates the type of demand.

 An employee demand.

 A global demand.

Tracking Training Plans

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

Pages Used to Track Training Plans

Page Name	Object Name	Navigation	Usage
Departmental View	TRN_DSPL_TARGET	Enterprise Learning, Define Budget, Departmental View, Departmental View	Define departmental groups to display all or part of your training plan and compare actual costs to budgeted costs.
Review Training Plan - Course List	TRN_PLAN_APR_TABLE	Enterprise Learning, Training Budget, Budget Reports, Review Training Plan, Course List	View training plans by department.

Defining Departmental Groups

Access the Departmental View page.

Departmental View

Business Unit:

CAN01 CAN01 BU for Canada

Dept View ID:

KCHR

*Description:

CAN01 Human Resources

Short Description:

CAN01 HR

Department View Details

Find | View All First 1-6 of 6 Last

Department	Tree
10000	Human Resources
10500	Benefits
11000	Information Systems
13000	Finance
14000	Administration
22000	Sales and Services

Departmental View page

In the Department field, select the departments to include in your view. The Tree field provides options and information about the department.

See Also

[Chapter 5, “Defining Training Requirements,” Department Trees, page 63](#)

Freezing Budgets, Moving Unapproved Demands, and Deleting Scenarios

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

Once you freeze a budget:

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

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

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

This section discusses how to:

- Freeze budget periods.
- Move unapproved demands to the next period.
- Delete obsolete global scenarios.

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

Page Name	Object Name	Navigation	Usage
Freeze Budget Period	TRN_FREEZE_PERIOD	Enterprise Learning, Training Budget, Freeze Training Budget, Freeze Budget Period, Freeze Budget Period	Freeze or unfreeze a budget period.
Move Non Approved Demands	RUNCTL_TRN015	Enterprise Learning, Training Budget, Freeze Training Budget, Move Non-Approved Demand, Move Non-Approved Demands	Once the current budget period has been frozen, move unapproved demands to the next budget period.
Delete Inactive, Gbl Scenarios (delete inactive, global scenarios)	RUNCTL_TRN031	Enterprise Learning, Training Budget, Create Budget Plan, Delete Inactive Gbl Scenario, Delete Inactive Gbl Scenarios	Delete obsolete global scenarios. You can delete a global scenario only if the scenario's status is Inactive and the budget period for the associated business unit is frozen.

Freezing Budget Periods

Access the Freeze Budget Period page.

Freeze Budget Period				
Budget Period:	K1999CALYR	1999 Training Budget Period	☒ Frozen	
Business Unit:	CAN01	CAN01 BU for Canada		
From Date:	01/01/1999	Thru Date:	12/31/1999	Base Currency: CAD

Budget / Costs				
Approved	Budget	Ratio	Computed Cost	
0	0.00	-- %	0.00	Refresh

Freeze Budget Period page

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

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

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

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

Moving Unapproved Demands to the Next Period

Access the Move Non Approved Demands page.

Move Non Approved Demands	
Run Control ID: GN2	Report Manager Process Monitor Run
Language:	English
Budget Period:	
Business Unit:	
Target Budget Period:	
☐ Data Override	

Move Non Approved Demands page

A demand with an Approved field value of 0 is considered unapproved. Also, if you have a demand ID with a requested demand of 16, and you approved only 12, the system considers the unapproved demands for the demand ID to be 4, because you didn't approve 4 of the requested headcount. The Move Non Approved Demands process carries forward the 4 unapproved demands for the demand ID.

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

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

Note. Apply this process to unapproved budgets before creating new demands for the target budget period.

Data Override If you have already run the Move Non Approved Demands process, select to override the results from the previous run with the new results.

Important! If you clear this check box, and you're running the process for the first time, the system does not override any manual changes that you've made to the process results. If you rerun the process later with this check box selected, then any changes that you made for unapproved demands on the source budget period are reflected in the target budget period. If the check box is clear, you'll lose any changes.

Deleting Obsolete Scenarios

Access the Delete Inactive, Gbl Scenarios page.

Delete Inactive, Gbl Scenarios

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#)

Scenario Details			Find View All	First	1 of 1	Last
*Scenario	Budget Period	Business Unit				
			+ -			

Delete Inactive, Gbl Scenarios page

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

Scenario Details

Scenario

Select the scenario to delete. The system lists only the scenarios that are inactive and refer to a frozen budget period. When you move out of this field, the system populates the Budget Period and Business Unit fields.

Add a row for each scenario that you want to delete.

Budget Period

Displays the budget period that you associated with the scenario. You specify the budget period when you create the scenario.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Running Budget Training Reports

This section discusses how to generate budget training reports.

Pages Used to Run Budget Training Reports

Page Name	Object Name	Navigation	Usage
Active Scenario Summary	RUNCTL_TRN010	Enterprise Learning, Training Budget, Budget Reports, Active Scenario Summary, Active Scenario Summary	Summarizes approved training demands and budget information for a business unit. This is an SQR report.
Global Scenario Summary	RUNCTL_TRN011	Enterprise Learning, Training Budget, Budget Reports, Global Scenario Summary, Global Scenario Summary	Summarizes approved training demands and budget information for the department or business unit. It retrieves the information from the selected global scenario. This is an SQR report.
Training Plan Summary	RUNCTL_TRN030	Enterprise Learning, Training Budget, Budget Reports, Training Plan Summary, Training Plan Summary	Lists all courses that are included in the training plan for a given budget period and business unit. For each course, the report includes the cost, the number of people approved, and the total number of hours of training, which is calculated by multiplying the number of approved employees by the course duration. This is an SQR report.
(FRA) Training Plan: Distribution	RUNCTL_TRN035	Enterprise Learning, Training Budget, Budget Reports, Training Plan Distribution FRA, Training Plan: Distribution	Details how a French organization's training demands are distributed by gender and professional category, such as executive, manager, office worker, qualified worker, and nonqualified worker. This is an SQR report.
(FRA) Training Plan: Cost Details	RUNCTL_TRN036	Enterprise Learning, Training Budget, Budget Reports, Training Plan Cost Details FRA, Training Plan: Cost Details	Lists a French organization's training costs that are associated with each course. Details these cost types: facility, instructor, vendor, equipment, salary costs, and expenses. This is an SQR report.

CHAPTER 7

Administering Course Sessions

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

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

Understanding Course Sessions

This section lists common elements and discusses cut sessions.

Common Elements Used in This Chapter

Business Unit	Select the unit to which a cost should be applied when you update your budgets, using the Compute Student Costs and Update Planned and Real Costs processes.
Department	Select a department to associate with the selected business unit.
TrngReq# (training request number)	The system displays this number on some course evaluation pages.
(FRA) Financing Department	Select the department that receives funds.
(FRA) Financed Cost	Enter the amount if some or all of the cost is financed by an external fund.
(FRA) Financing Fund	Select the fund that is financing the cost. Define funds in the Vendor table.

Cut Sessions

Course sessions can be divided into cut sessions. Each cut session has its own start date, end date, location, and instructor. Use cut sessions for course sessions that:

- Don't run consecutively from start to finish, such as a course that runs two days a week for a month.
- Are held in various training rooms or facilities.
- Have multiple instructors.

See Also

Chapter 4, “Defining Training Courses and Programs,” page 29

Planning and Setting Up Course Sessions

This section discusses how to:

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

Pages Used to Plan and Set Up Course Sessions

Page Name	Object Name	Navigation	Usage
Course Session Planner	CRS_SESS_PLAN1	Enterprise Learning, Define Course/Cost Details, Course Session Planner, Course Session Planner	Plan new course sessions and check availability of training rooms and instructors.
Crse Session Planner Facility (course session planner facility)	TRN_PLAN_FAC_SEC	Click the room number on the Course Session Planner page.	View room booking details. All displayed data comes from the Course Session table.
Course Session Planner Instr. (course session planner instructor)	TRN_PLAN_INSTR_SEC	Click the instructor name on the Course Session Planner page.	View instructor schedules.
Course Session Profile	COURSE_SESSN_TBL1	Enterprise Learning, Define Course/Cost Details, Course Sessions, Course Session Profile	Set up general information about the course session, including start and end dates, session length, number of students who can enroll in the session, and session language if the course is multilingual.

Page Name	Object Name	Navigation	Usage
Course Sessions - Location, Instructor	COURSE_SESSN_TBL2A	Enterprise Learning, Define Course/Cost Details, Course Sessions, Location, Instructor	Set up the location of the course session and the course instructor. If you are dividing the session into cut sessions, set up the start and end dates, location, and instructor for each cut session. Before using this page, set up training facilities on the Training Facility table. If you use external companies to manage course sessions, add them to the Vendor table. Add instructors to the Instructor table.
Training Facility Address	TRN_FACIL_ADDR_SEC	Click Training Facility Address on the Course Sessions - Location, Instructor page.	View and update the address and contact details of the course session or cut session.
Select Free Training Room	TRN_ROOM_SEL_SEC	Click Select free Training Room on the Course Sessions - Location, Instructor page.	Select a training room for the course session or cut session.
Select Free Instructor	TRN_INSTR_SEL_SEC	Click Select free Instructor on the Course Sessions - Location, Instructor page.	Select an instructor for the course session or cut session.
Course Sessions - Equipment	COURSE_SESSN_TBL3A	Enterprise Learning, Define Course/Cost Details, Course Sessions, Equipment	Specify the equipment and materials that are required for the course session. You set up equipment codes on the Equipment and Materials Table page.
Training Facility Equipment	TRN_FAC_EQUIP_SEC	Click Training Facility Equipment on the Course Sessions - Equipment page.	View the equipment and materials available at the training facility.
Course Sessions - Expense	COURSE_SESSN_TBL4A	Enterprise Learning, Define Course/Cost Details, Course Sessions, Expense	Define miscellaneous expenses that are associated with a course session. Set up the Tuition Expense Type Table page before using this page.
Course Session Summary	TRN_CRS_STUDNT_SUM	Enterprise Learning, Result Tracking, Review Session Summary, Course Session Summary	View details of a course session, including the start and end dates, session location, and list of students.

Planning New Course Sessions

Access the Course Session Planner page.

Course Session Planner

Course Code: 2SE88 2 Sessions

Duration: 2.0 Day

Start/End Dates:  

Facility:  Room Code:

Course Session Setup

Training Room Booked Time

Customize | Find | View All |  First  1 of 1  Last

Facility	Room Number	Start Date	End Date	Start Time	End Time

Instructor: 

Instructor Booked Time

Customize | Find | View All |  First  1 of 1  Last

Instructor	Name	Start Date	End Date	Start Time	End Time

Course Session Planner page

Start/End Dates

When you leave these fields, the system updates the instructor grid with the qualified instructors who are booked during the specified period. If you have specified a facility, the system updates the facility grid with existing bookings.

You can make this period as long as you want and then adjust the dates as you narrow your search for free instructors and training rooms. The system doesn't check instructor or facility availability until you select a start date. Before setting up the course session, you must complete both dates, because they become the course session start and end dates when you click Course Session Setup.

Start/End Times

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

Course Session Setup

Click to set up the course session. The Instructor and Facility fields aren't mandatory, so you can set up a course session with just one of them completed.

If you don't select an end date, or if the instructor or training room that you selected is booked, you can't click the link.

When you click Course Session Setup, the system transfers you to the Course Session component and copies the data from the Course Session Planner page. When you save the Course Session component, the system returns to the Course Session Planner page.

Facility

Select a facility from the list. When you move out of the field, the system checks the Course Session Table for existing bookings and displays in the Training Room Booked Time group box the dates and times when training rooms at the facility are booked during the specified period. Click the Room Number link in that group box to check the Crse Session Planner Facility page for booking details. If the Training Room Booked Time group box is blank, the facility is free during the specified period.

Room Code

The system makes this field available for entry when you complete the Facility field. Select a room code from the list. When you leave the field,

the system checks existing room bookings and updates the Training Room Booked Time group box to show the bookings for the selected room. If this group box is blank, there are no bookings for that room.

Instructor

Select an instructor from the list. When you leave the field, the system checks the instructor's availability and lists in the Instructor Booked Time group box the dates and times that the instructor is unavailable during the specified period. Click the instructor's name in that group box to view the Course Session Planner Instr. page, where you can view the reason that the instructor is unavailable. The system also checks the instructor's training schedule and absence history. If the Instructor Booked Time group box is blank, the instructor is available for the specified period.

Viewing Instructor Schedules

Access the Course Session Planner Instr. page.

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

Description

If the instructor is scheduled to teach, the system displays the name of the course. Otherwise, the system displays the reason for the instructor's absence.

Setting Up General Session Information

Access the Course Sessions - Course Session Profile page.

Course Session Profile		Location, Instructor		Equipment		Expense	
Course:	2SESS	2 Sessions	Course Status: Active				
Session Number:	0001	School:					
*Session Status:	Active		☒ Session Administration				
Start/End Dates:	01/01/2000		01/01/2000	☐ Rescheduled			
Start/End Times:	9:00AM		5:00PM				
Duration:	2.0	Duration Unit:	Day				
Min Students/Session:	2	Max Students/Session:	6				
Session Language:							
Vendor ID:							

Course Sessions - Course Session Profile page

To set up course sessions, you must have created the course in the Course table, given it an Active status, and selected the Session Administration check box.

Session Number	If you add a new session and leave this blank, a sequential session number is generated. You can reuse session numbers from completed or canceled sessions.
Session Status	Select a status: <i>Active:</i> Select this default status when you create a new course session. You can enroll students only in active sessions. <i>Canceled:</i> Select if the session has been canceled. <i>Complete:</i> Select if the course session has been completed. This updates data for each enrollee.
Start/End Dates and Start/End Times	When you change the start or end date, the system updates the student training records for students who are on waiting lists or enrolled in course sessions.
Rescheduled	Select if you change session information, such as dates or times, so that you know that you've made changes to the original information. When you select this check box and save the page, the system changes the letter code in the student training record to <i>RSC</i> (reschedule). You can create a form letter to notify students of rescheduled sessions.
Session Administration	When selected, PeopleSoft Human Resources administers the course session. This check box is automatically selected, but you can clear it.
Duration and Duration Unit	Automatically populated from the Course table. You can change these values.
Min Students/ Session (minimum students per session) and Max Students/Session (maximum students per session)	Automatically populated from the Course table. If you're enrolling students in this session using the Course Auto Enrollment page, enter a number in the Max Students/Session field—otherwise the system can't enroll any students in the course. If you select a training facility code on the Course Session Table - Location, Instructor page, the system validates the number that you enter in the Max Students/Session field against the room's maximum capacity.
Session Language	This field is available if the course is designated as multilingual on the Course Table - Course Profile page.
Vendor ID	Select a vendor ID if you're outsourcing any part of a session to a vendor. Vendor IDs are stored in the Vendor table.

See Also

Chapter 7, "Administering Course Sessions," Closing Completed or Canceled Sessions, page 128

Setting Up Session Locations and Instructors

Access the Course Sessions - Location, Instructor page.

Training Location

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

Start/End Dates and Start/End Times	Displays the course session dates and times. If the course session is divided into cut sessions, insert a row for each session, adjust the dates for each row, and adjust the times, if they vary.
Duration and Duration Unit	Automatically populated from the Course Session Table - Course Session Profile page. If the course session is divided into cut sessions, adjust for each cut session. Make sure that the duration of all cut sessions equals that of the course session.
Facility	If the session is at a facility that you set up in the Training Facility table, select the appropriate facility. When you leave this field, the system completes the facility name fields; you can't change them. If the training facility isn't set up in the Training Facility table, leave this field blank.
Vendor ID	If a vendor is managing the course session, select a vendor ID. When you leave this field, the system enters the vendor name.
Select free Training Room	Click this link to access the Select Free Training Room page. The system displays rooms that are available during the specified period. If the Facility field is blank, this link is unavailable. After you select a room on the Select Free Training Room page, the room code, room name, building, floor number, and maximum number of students appear on the Course Sessions - Location, Instructor page. (The building and floor number are optional fields on the Training Facility Table - Training Rooms page and only appear if applicable.)
Training Facility Address	Click to access the Training Facility Address page, which displays the address of the selected facility or vendor. If the Facility and Vendor ID fields are blank, the Training Facility Address page is blank.
Instructor	
Vendor	If the instructor is from a vendor, select the vendor ID. When you leave this field, the system displays the vendor name.
Select free Instructor	Click this link to access the Select Free Instructor page. The system displays qualified instructors who are available during the specified period. After you select an instructor, the instructor ID and name appear on the Course Sessions - Location, Instructor page.

Viewing and Updating Session Address and Contact Details

Access the Training Facility Address page.

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

Contact Name	Enter the name of a contact at the training facility. If you selected a facility on the Course Session Table - Location, Instructor page, the system displays the contact name from the Training Facility Table - Contacts and Equipment page. You can update the name.
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Phone	Enter the telephone number of the person named in Contact Name. If the person has a business phone number specified, the system completes the Phone field automatically. You can update the number.
Country	If you selected a training facility or a vendor on the Course Session Table - Location, Instructor page, the system completes the Country and address fields, making them unavailable for entry. If the Country field is blank, select from the list of valid values. When you leave the field, the system dynamically generates that country's proper address format, as specified on the Country Table, Address Format page.

Choosing Training Rooms

Access the Select Free Training Room page.

The system displays the rooms that meet these criteria:

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

Room Code	Select a check box to book the associated training room for the course session or cut session.
Room Nbr (room number)	System-displayed. You set up training rooms in the Training Facility Table page.

Choosing Instructors

Access the Select Free Instructor page.

The system includes displays instructors who are:

- Qualified to teach the course.

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

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

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

Instructor	Select a check box to book the associated instructor for the course session or cut session.
Name	System-displayed. You set up instructors on the Instructor Table - Instructor Profile page.

Specifying Required Equipment and Materials

Access the Course Sessions - Equipment page.

Course Session Profile | **Location, Instructor** | **Equipment** | **Expense**

Course: 2SESS 2 Sessions **Course Status:** Active

Session #: 0001 **Session Status:** Active

Training Room Equipment Find | View All First 1 of 1 Last

Start Date: 01/01/2000 **Facility:** Training Facility Equipment

Room Code:

Fixed Equipment/Materials Find | View All First 1 of 1 Last

Equipment/Materials Code	Quantity

Session Equipment/Materials Find | View All First 1 of 1 Last

*Equipment/Materials Code	Quantity
	1

Course Sessions - Equipment page

Training Room Equipment

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

Training Facility Equipment

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

Fixed Equipment/Materials

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

Session Equipment/Materials

Use this scroll area to specify the equipment and materials required for the course session. The list is initially populated by the Course Cost - Vendor, Facility, and Equipment page.

Equipment/Materials Code (equipment code)

You set up equipment or material codes on the Equipment and Materials Table page.

If you selected a training facility on the Course Session Table - Location, Instructor page, you don't need to include the fixed equipment shown in the Fixed Equipment/Materials scroll area.

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

Viewing Available Equipment and Materials

Access the Training Facility Equipment page.

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

Defining Miscellaneous Session Expenses

Access the Course Sessions - Expense page.

The screenshot displays the 'Course Sessions - Expense' page. At the top, there are tabs for 'Vendor', 'Facility, Instructor', 'Equipment', and 'Expense'. The 'Expense' tab is active. Below the tabs, course and session information is shown: Course: 28E88, 2 Sessions, Course Status: Active, Session #: 0001, Session Status: Active, Start Date: 01/01/2000. The main section is titled 'Session Expenses' and includes a search bar with 'Find | View All' and navigation buttons 'First', '1 of 1', and 'Last'. Below this is a form for defining expenses with the following fields: Expense Type, Per Unit Cost, Currency Code (set to USD), Cost Unit (set to Hour), Qty (set to 1), Business Unit, and Department. A dropdown menu for 'France' is expanded, showing a sub-section with fields: Financed Cost, Currency Code (set to USD), Financing Fund, and Financing Department.

Course Sessions - Expense page

Use this scroll area to list the types of expenses that are associated with this course session. The list is initially populated by fields from the Course Cost - Instructor, Expense page.

Viewing Session Details

Access the Course Session Summary page.

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

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

Status

Displays the session status:

Active: The default status when you add a new session.

Canceled: The session has been canceled.

Complete: The course session has completed.

Grade

If a student has successfully completed the course, the system displays the student's grade. Enter grades on the Student Training - Course Student Enrollment page.

Setting Up Course Session Costs

Different sessions of the same course might have different costs, if a course is taught in multiple geographical areas or facilities, for example. If you defined general course costs in the Course Cost table, you can modify them at the session level.

This section discusses how to:

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

Note. Establish costs for training facilities only if you use training budgets.

Note. The annuity factor must be set before entering costs.

See Also

Chapter 3, "Setting Up Training Costs," Overview of Cost Units and Cost Type, page 14

Pages Used to Set Up Course Session Costs

Page Name	Object Name	Navigation	Usage
Course Session Costs - Vendor	CRS_SESSN_TBL5_GBL	Enterprise Learning, Defining Course/Cost Details, Course Session Costs	Enter vendor costs for a course session. Vendor costs are set up in the Course Session table.
Course Session Costs - Facility, Instructor	CRS_SESS_TBL6A_GBL	Enterprise Learning, Defining Course/Cost Details, Course Session Costs, Facility, Instructor	Set up session costs that are associated with the facility and instructor. If you divided the course session into cut sessions, enter costs for each cut session.
Course Session Costs - Equipment	CRS_SESS_TBL7A_GBL	Enterprise Learning, Defining Course/Cost Details, Course Session Costs, Equipment	Record costs that are associated with course equipment.
Course Session Costs - Expense	CRS_SESSN_TBL8_GBL	Enterprise Learning, Defining Course/Cost Details, Course Session Costs, Expense	Record costs associated with session expenses. You can enter costs only for the expense types that you specified on the Course Session Table - Expense page.

Entering Vendor Costs for a Course Session

Access the Vendor page.

Vendor		Facility, Instructor		Equipment		Expense																																	
Course:	2SESS	2 Sessions		Course Status:	Active																																		
Session #:	0001	Session Status:	Active	Start Date:	01/01/2000																																		
Vendor:																																							
Per Unit Cost		Currency Code:	USD	Cost Unit	Hour	Business Unit																																	
France <table border="1"> <tr> <td>Financed Cost</td> <td> </td> <td>Currency Code:</td> <td> USD </td> <td>Financing Fund</td> <td> </td> <td>Financing Department</td> <td> </td> </tr> <tr> <td>☐ Certified</td> <td colspan="2">☐ Chargeable</td> <td colspan="5"></td> </tr> <tr> <td>☐ Billed</td> <td>Date Entered:</td> <td colspan="2"> </td> <td colspan="4"></td> </tr> <tr> <td>Agreement Date:</td> <td> </td> <td>Company:</td> <td colspan="5"> </td> </tr> </table>								Financed Cost		Currency Code:	USD	Financing Fund		Financing Department		☐ Certified	☐ Chargeable							☐ Billed	Date Entered:							Agreement Date:		Company:					
Financed Cost		Currency Code:	USD	Financing Fund		Financing Department																																	
☐ Certified	☐ Chargeable																																						
☐ Billed	Date Entered:																																						
Agreement Date:		Company:																																					

Vendor page

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

Per Unit Cost

Enter for the vendor that is associated with this course session. Select a currency if it is not the default currency. If you didn't specify a vendor for this course session, this field isn't available.

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

Cost Unit

Select the unit that is associated with the amount in the Per Unit Cost field; for example:

Hour: To track hourly charges.

Day: If the vendor bills by the day.

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

(FRA) France

You define additional course session cost financing information for 2483 report requirements.

Certified	Select if the vendor administering the course session is government-certified.
Chargeable	Select if the vendor costs are chargeable to the company.
Billed	Select to include the vendor cost in your 2483 report. Clear the check box to track the cost but not have it included in the 2483 report.
Date Entered	Enter the date that the agreement between the vendor and the government body was recorded in your system.
Agreement Date	Enter the start date for the agreement between the vendor and the government body.
Company	Select the government body that the vendor has an agreement with.

See Also

Chapter 12, “(FRA) Producing the French Training Report 2483,” page 189

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

Access the Course Session Costs - Facility, Instructor page.

The screenshot displays the 'Course Session Costs - Facility, Instructor' page. At the top, there are tabs for 'Vendor', 'Facility, Instructor' (selected), 'Equipment', and 'Expense'. Below the tabs, course and session details are shown: Course: 28ESS, 2 Sessions, Course Status: Active, Session #: 0001, Session Status: Active, and Start Date: 01/01/2000. The 'Facility' section includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. The main form area contains fields for 'Start Date' (01/01/2000), 'Vendor', 'Facility', 'Room Code', 'Per Unit Cost', 'Currency Code' (USD), 'Cost Unit' (Hour), 'Business Unit', and 'Department'. A dropdown menu shows 'France' selected. At the bottom, there is a section for 'Financing' with fields for 'Financed Cost', 'Currency Code' (USD), 'Financing Fund', and 'Financing Department'.

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

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

Facility

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

Vendor

If the session is at a vendor site, this field is unavailable.

Per Unit Cost

Enter for the facility where the session is held. You can update the cost currency.

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

Cost Unit

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

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

Instructor

Instructor data is populated from the Course Session Table - Location, Instructor page. Instructor costs are populated from the Instructor Table - Instructor Profile page. If instructors aren't specified, the fields are unavailable.

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

Instructor

Displays information from the Course Session table.

Vendor

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

Per Unit Cost	Enter the cost for the instructor associated with this session. In the next field, the default currency appears. You can select a different currency.
Cost Unit	Select the unit in which the instructor's per-unit cost amount is measured. For example, if the instructor is paid a daily rate, select <i>Daily</i> .
Duration	This value is populated from the Course Session table. Update this field if the instructor costs don't match the session duration. For example, if the session duration is 2.5 days but the instructor charges for 3 days, update this field to 3 days. Updating this field doesn't change the data in the Course Session table.

Recording Costs That Are Associated With Required Equipment

Access the Course Session Costs - Equipment page.

Course Session Costs - Equipment page

The system gets equipment and materials data from the Course Session table. To update or modify information, use the Course Session Table - Equipment page.

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

Per Unit Cost	Enter an amount for the item specified by the equipment code. Select a cost currency to change the default for this cost. Specify the default currency for business units for a budget period on the Budget Period table. Budgets are automatically converted to the default base currency that you establish on the Training Base Currency table (TRN_BASE_CURRENCY).
Qty (quantity)	Initially populated by the Course Session table. If you enter a new quantity and save the changes, the system updates the data in the Course Session table.

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

Recording Costs That Are Associated With Course Session Expenses

Access the Course Session Costs - Expense page.

The screenshot shows the 'Course Session Costs - Expense' page. At the top, there are tabs for 'Vendor', 'Facility, Instructor', 'Equipment', and 'Expense'. The 'Expense' tab is active. Below the tabs, course information is displayed: 'Course: 2SESS' with '2 Sessions', 'Course Status: Active', 'Session #: 0001', 'Session Status: Active', and 'Start Date: 01/01/2000'. The main section is titled 'Session Expenses' and includes a search bar with 'Find | View All' and pagination 'First 1 of 1 Last'. Below this is a table for entering expenses. The table has columns for 'Expense Type', 'Per Unit Cost', 'Currency Code', 'Cost Unit', 'Qty', 'Business Unit', and 'Department'. The 'Expense Type' dropdown is set to 'France'. The 'Per Unit Cost' field is empty. The 'Currency Code' is 'USD'. The 'Cost Unit' is 'Hour'. The 'Qty' is '1'. The 'Business Unit' and 'Department' fields are empty. Below the table, there is a section for 'Financed Cost' with fields for 'Currency Code' (USD), 'Financing Fund', and 'Financing Department'.

Course Session Costs - Expense page

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

Per Unit Cost

Enter a per unit cost for each expense type that is associated with this course session. The default currency is displayed; you can select a different currency.

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

Cost Unit

Select the unit in which the per-unit cost amount is measured. For example, if you're tracking hourly charges for parking, select *Hour*; if you reimburse a flat rate for parking, choose *Flat Cost*.

Business Unit

If you're entering information for more than one expense, you can specify that each one be billed to a different business unit and department.

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

Closing Completed or Canceled Sessions

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

To close or cancel a course session:

1. Select the course session from the Course Session table.

Access the Course Session Table - Course Session Profile page and select the session from the list of active sessions.

2. Change the session status to *Complete*, if the session has finished, or *Canceled*, to cancel it.

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

- Student training profiles.

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

- Student competency profiles.

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

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

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

If any students are on a waiting list for a canceled or completed session, put the students back on the waiting list so that you can enroll them in other sessions.

If you have students with a status of Session Waitlist, use the Course Wait List page to add them to the waiting list.

See Also

Chapter 8, "Enrolling and Waitlisting Students," Generating Student Form Letters, page 136

Chapter 7, "Administering Course Sessions," Planning and Setting Up Course Sessions, page 112

Recording Student Feedback

This section discusses how to:

- Record general student feedback on course sessions.

- (USF) Enter individual training evaluations.
- Record specific student feedback.

Pages Used to Record Student Feedback

Page Name	Object Name	Navigation	Usage
Course Session Evaluations	COURSE_EVALUATNS	Enterprise Learning, Result Tracking, Evaluate Course Session, Course Session Evaluations	Record student feedback on course sessions so that you know what areas need improvement.
Individual Training Evaluation - Course Information	GVT_TRNREQ_SEC_CE1	Enterprise Learning, Result Tracking, Individual Training Evaluation, Course Information	Enter general information about the course, including the start and end date of the course session and the course hours. Indicate each employee's completion status, grade, and overall rating of the course.
Individual Training Evaluation - Evaluation Data	GVT_TRNREQ_SEC_CE2	Enterprise Learning, Result Tracking, Individual Training Evaluation, Evaluation Data	Record an employee's feedback about various areas of the course such as course materials, applicability of the course, and training facilities.
Individual Training Evaluation - Comments	GVT_TRNREQ_SEC_CE3	Enterprise Learning, Result Tracking, Individual Training Evaluation, Comments	Enter employee comments about strong or weak aspects of the training. Enter employee recommendations.

Recording General Student Feedback on Course Sessions

Access the Course Session Evaluations page.

Course Session Evaluations

Course: H100 Hospital Orientation

Session #: 0003

Start Date: 06/16/1997

Facility: Hospital

Language:

Instructor

Find | View All First 1 of 1 Last

Snyder,Jackie GH06

Ratings Area

Find | View All First 1 of 1 Last

Average Rating Total Count Session Average

*Rating Area:

+

-

Ratings

Find | View All First 1 of 1 Last

*Rating Rating Points *Total Count

+

-

Course Session Evaluations page

If you entered a facility and instructor in the Course Session table, the system displays the information here.

Ratings Area

Rating Area	Select from <i>Content</i> , <i>Facility</i> , <i>Instructors</i> , <i>Materials</i> , or <i>Presentation</i> .
Average Rating	Displays the average rating for the area.
Total Count	Displays the number of evaluations received for the rating area. This is the sum of the Total Count fields in the Ratings scroll area.
Session Average	Displays the overall average rating for the session. This is the average of the Average Rating values for all rating areas.

Ratings

Use this scroll area to enter student evaluations of the specified rating area. Add a row for each rating level. For example, if four students evaluate the Content area of the course session, with three students giving a rating of *Excellent* and one student giving a rating of *Good*, you add one row to record the number of *Excellent* ratings and one row for the *Good* ratings.

Rating Points	Displays the number of points associated with the rating you selected. The points associated with each rating are:
	1: Excellent
	2: Good
	3: Fair

130

PeopleSoft Proprietary and Confidential

4: Poor

Total Count

Enter the number of students who gave each rating.

(USF) Entering Individual Training Evaluations

Access the Individual Training Evaluation - Course Information page.

Course Information		Evaluation Data		Comments	
Falcone,Joan			EmplID: HXSSMGR01		
Course Code: Session #: Training Request Number: NEW					
Course was Completed ☒ Yes ☐ No Use comment section to explain		Actual Course Dates Commenced: Completed:		Actual Course Hours Duty: Non-Duty:	
All Sessions Attended ☒ Yes ☐ No Use comment section to explain		Academic Info Grade/Score:			
		Comments 			
*Stated Objective Accomplished:					
*Coverage of Subject Matter:					

Individual Training Evaluation - Course Information page

Federal users can enter detailed training evaluations for individual employees.

All Sessions Attended

Select *Yes* or *No*.

Comments

Enter an optional explanation of the responses to the preceding fields.

Actual Course Hours

Duty

Enter the number of hours in training that are normally spent at work.

Non-Duty

Enter the number of hours spent in training or required for travel outside of duty hours.

Recording Specific Employee Feedback

Access the Individual Training Evaluation - Evaluation Data page.

Course Information	Evaluation Data	Comments																				
Falcone,Joan EmplID: HXSSMGR01 TrngReq#: NEW Course:																						
<table border="1"> <tr> <td>*Organization of Subject Matter:</td> <td> </td> </tr> <tr> <td>*Suitability of Instr Materials:</td> <td> </td> </tr> <tr> <td>*Level of Difficulty:</td> <td> </td> </tr> <tr> <td>*Length of Course:</td> <td> </td> </tr> <tr> <td>*Amt of Outside or Evening Work:</td> <td> </td> </tr> <tr> <td>*Effectiveness of Instructors:</td> <td> </td> </tr> <tr> <td>*Appl of Subject Matter to Work:</td> <td> </td> </tr> <tr> <td>*Facilities:</td> <td> </td> </tr> <tr> <td>*Recommendations to Colleagues:</td> <td> </td> </tr> <tr> <td>*Meet Career Development Plans:</td> <td> </td> </tr> </table>			*Organization of Subject Matter:		*Suitability of Instr Materials:		*Level of Difficulty:		*Length of Course:		*Amt of Outside or Evening Work:		*Effectiveness of Instructors:		*Appl of Subject Matter to Work:		*Facilities:		*Recommendations to Colleagues:		*Meet Career Development Plans:	
*Organization of Subject Matter:																						
*Suitability of Instr Materials:																						
*Level of Difficulty:																						
*Length of Course:																						
*Amt of Outside or Evening Work:																						
*Effectiveness of Instructors:																						
*Appl of Subject Matter to Work:																						
*Facilities:																						
*Recommendations to Colleagues:																						
*Meet Career Development Plans:																						

Individual Training Evaluation - Evaluation Data page

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

Suitability of Instr Materials (suitability of instructor's materials) Select *Poorly suited, Adequate, or Well Suited.*

Level of Difficulty Select *Appropriate, Too Advanced, or Too Elementary.*

Length of Course Select *Appropriate, Too Long, or Too Short.*

Amt of Outside or Evening Work (amount of outside or evening work) Select *Appropriate, Insufficient, or Too Much.*

Effectiveness of Instructors Select *Excellent, Good, or Poor.*

Appl of Subject Matter to Work (applicability of subject matter to work) Select *Insignificant, Adequate, or Significant.*

Facilities Select *Excellent, Good, or Poor.*

Recommendations to Colleagues Select *Highly Recommend or Not Recommend.*

Meet Career Development Plans Select *No, Yes, or Not Applicable.*

Running Course Session Reports

This section discusses how to generate reports of scheduled course sessions.

Pages Used to Run Course Session Reports

Page Name	Object Name	Navigation	Usage
Course Session Roster	RUNCTL_TRN002	Enterprise Learning, Course Reports, Course Session Roster, Course Session Roster	Lists the course name, session number, session start date, and all students who are enrolled in a course. This is a Crystal report.
Training Schedule	RUNCTL_TRN004	Enterprise Learning, Training Reports, Training Schedules, Training Schedule	Lists course sessions that are scheduled within a given period. This is a Crystal report.
Training Facility Schedule	RUNCTL_TRN005	Enterprise Learning, Training Reports, Training Facility Schedules, Training Facility Schedule	Lists course sessions scheduled at a training facility during a given period. Sessions are listed by course start date. This is a Crystal report.
Course Attendance Status	RUNCTL_TRN018	Enterprise Learning, Course Reports, Attendance Status, Course Attendance Status	Lists the attendance status of the students in a course. This is an SQR report.
Course Rating	RUNCTL_TRN017	Enterprise Learning, Course Reports, Course Rating	Details ratings for sessions of a course. This is a Crystal report.
Course Ratings Templates	RUNCTL_TRN019	Enterprise Learning, Course Reports, Course Rating Templates, Course Rating Templates	This evaluation template is completed by students enrolled in a course session. This is a Crystal report.
Course Statistics	RUNCTL_TRN022	Enterprise Learning, Course Reports, Course Statistics	Lists the employees who are enrolled in courses and lists course statistics by company, location, and department. This is an SQR report.
Training Instructor Schedule	RUNCTL_TRN033	Enterprise Learning, Training Reports, Training Instructor Schedules, Training Instructor Schedule	Lists the courses that an instructor is scheduled to teach during a given period. This is a Crystal report.
Equipment Checklist	RUNCTL_TRN034	Enterprise Learning, Training Reports, Equipment Checklist, Equipment Checklist	Lists required equipment for a course session. For each item, the report shows the quantity required, the number available in the training room and facility, and the total number that is booked at the facility for a given period. This is an SQR report.

CHAPTER 8

Enrolling and Waitlisting Students

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

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

Understanding Student Enrollment Options

This section lists common elements and discusses enrollment methods.

Common Elements Used in This Chapter

First, Previous, Next, and Last	Click to display another group of student IDs.
Refresh Search Fields	Click to clear the search criteria that you entered on the Name or ID Search page.
Search on Name or ID	Click to access the Name or ID Search page and filter students by name or ID.

Enrollment Methods

Enrollment options include:

- Setting up sessions in advance and publishing a training schedule that students review to make their enrollment requests.
- Setting up waiting lists and creating course sessions only when there are enough students to fill the session.

Note. When you use the Enroll by Department Demand, Enroll by Employee Demands, or Group Enroll components, students with a waitlist status also appear in the course waiting list, and students with an enrolled status appear on the Course Session Enrollment page.

For all enrollment options, you can generate standard letters to notify students when you enroll them in a course or reschedule or cancel a course session.

Generating Student Form Letters

This section discusses how to:

- Administer training letters.
- Run the training letter report.

Page Used to Generate Student Form Letters

Page Name	Object Name	Navigation	Usage
Training Letters	RUNCTL_TRN001	Enterprise Learning, Student Enrollment, Create Training Letters, Training Letters	Create training letters.

Administering Training Letters

You can automatically generate a variety of student form letters. PeopleSoft Human Resources delivers samples of three types of administer training letters:

- Confirmation of course session enrollment.
- Notification of course session rescheduling.
- Notification of course session cancellation.

To generate training letters:

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

- Course Auto Enroll (course automatic enrollment)
- Course Session Enrollment
- Express Rescheduling
- Course Wait List
- Student Training

Review letter codes for in-house courses on this page. Once student records have letter codes, you can generate form letters anytime.

2. Run the Training Letters report to generate form letters containing student data. You can run the report for all course sessions that are scheduled within a defined period, for course sessions of a specified course within a defined period, or for one course session.

This report runs three processes:

- A Structured Query Report (SQR) to extract data from PeopleSoft Human Resources.

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

- A Microsoft Word for Windows macro to merge the data into a form letter template.
- A PeopleSoft Application Engine process that sends training letters by email to students who have an email address.

3. Print the training letters using Microsoft Word for Windows.

The system creates the form letters in a temporary directory on the application server, putting all letters of the same type in one file.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Generating Form Letters”

Running the Training Letters Report

Access the Training Letters page.

Training Letters

Run Control ID: GN2 [Report Manager](#) [Process Monitor](#) **Run**

Report Request Parameters:

From Date:  **Thru Date:** 

Or

Course Code:  **From Date:**  **Thru Date:** 

Or

Course Code:  **Course Session Nbr:** 

Training Letters page

From Date and Thru Date
(through date)

To generate letters for all course sessions within a period, enter the start and end date.

Course Code

To generate a letters for a specified course, select the course code and complete either:

- The From Date and Thru Date fields, to print letters of all sessions in the period.

Run

- The Course Session Nbr (number) field, to print letters for a single session.

Click the Run button to display the Process Scheduler Request page.

- Select the Email Training Letters process TRN001-J (process type PSJob) if you want Process Scheduler to automatically run the processes sequentially. Process Scheduler runs the SQR report process to extract data, initialize Winword, run the Application Engine that calls the Word macro to merge the data, and finally it runs the Application Engine process that will email training letters to students with email addresses.
- Select Training Letters process TRN001DG (Process Type PSJob) to create the letters without mailing them. In order to run the PSJob TRN001DG properly, at the first step of the PSJob (the SQR Report), select File in the Type File and LP in the Format Field. The PSJob will generate the letters into the third step (PSMERGE). Then Run the Application Engine process for emails.
- Select the Training Letters Data Extract process TRN001 (process type SQR Report) to create the data file in order to check the extracted data. Select *File* in the Type field and *LP* in the Format field. Then run the Application Engine process for emails. The file will be posted on the Web server, on Report Repository.

No matter what Output Destination that you specify on Process Scheduler, the system always sends the data extract files and the form letter to the Report Repository. You use Word for Windows to print the letters. Always run the Email Training Letters and Training Letters PSJobs on Process Schedulers set for WinWord processes.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Generating Form Letters,” Naming Conventions in Form Letter Files

Enrolling Students Manually

Enrolling individual students is useful if you create course sessions before students request enrollment.

Page Used to Enroll Students Manually

Page Name	Object Name	Navigation	Usage
Course Session Enrollment	COURSE_ENROLLMENT	Enterprise Learning, Student Enrollment, Enroll Individually, Course Session Enrollment	Enroll students, add them to a course session waiting list, and adjust to existing subscriptions. Check the results of your automatic enrollment. To adjust several student subscriptions, use the Course Auto Enroll page.
Employee Training Request Data (USF)	GVT_TREQ_DATA_A	Click the Trn Request (training request) button on the Course Session Enrollment page.	(USF) Enter employee training request data including purchase order information, direct and indirect cost appropriation, and billing instructions.

Enrolling Individual Students

Access the Course Session Enrollment page.

Course Session Enrollment

Course: HXAT00 New Hire Orientation **Session #:** 0003 Active
Start Date: 01/10/2000 **Start Time:** 8:00AM
Facility: HRTRN **Language:** English
Min Students: 5 **Max Students:** 25 [Prerequisite Checking](#)
Enrolled: 0 **# Waiting:** 0 [Transfer-Course Session Setup](#)

Attendance
Find | View All First 1 of 1 Last

EmplID: + -
***Enrollment/Attendance:** **Status Date:** 11/25/2002
Training Reason: ☐ Prerequisites Met
Letter Code: **Date Letter Printed:** **Grade:**

Department

Business Unit:
Department:

☒ Trn Request
[Trn Request](#)

Course Session Enrollment page (1 of 2)

Course Session Enrollment page (2 of 2)

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

Prerequisite Checking	Click to check whether a student has met the requirements for a course before confirming final enrollment.
Transfer-Course Session Setup	Click to access the Course Session table.
Enrollment/Attendance	Select a student's status: <i>Enrolled:</i> Enroll a student in the session. <i>Session Waitlist:</i> Add a student to a session waiting list. You can change a student's status to any value except <i>Course Waitlist</i> or <i>Currently Attending</i>. To add a student to a course waiting list, use the Course Wait List page. To change a student's status to <i>Course Waitlist</i> or <i>Currently Attending</i>, use the Student Training - Course Student Enrollment page. If you enroll more than the maximum number of students allowed in the session, you get a warning message when you save the page. (USF) <i>Request:</i> For U.S. federal users only. Use to enter a training request. When you've entered the training request data, PeopleSoft Workflow routes the request and tracks the process from <i>Request</i> to <i>Authorized</i> to <i>Enrolled</i> or <i>Waitlisted</i>.
Status Date	The system uses the system date, usually today's date, as the initial value, which you can change.
Waitlst Dt (waitlist date)	If the student is on a session waiting list, enter the waiting list date. The system hides this field when the student is enrolled in a training course.
Trn Reason (training reason)	Select a reason for the training.
Prerequisites Met	If you have set up prerequisites on the Course Table - Prereqs, Goals page, the system checks the student's records and selects this check box if the student has met all the prerequisites. Otherwise you can select the box manually.
Letter Code	To generate a form letter, select a letter code. Values are: <i>CON:</i> Used if the student's status is <i>Enrolled</i>.

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

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

Grade This field is available when the student’s status is *Completed*.

Department

Business Unit and Department The system populates these fields from the employee’s job data record. If you’ve enrolled a non-employee in a course session, the non-employee’s business unit information comes from the information that you entered in the Add Non-Employee component.

(USF) Training Request Data

U.S. federal users can request a training session and track student training processes, such as accessing student data, maintaining student training data, viewing training summary information, tracking student tuition reimbursement, and reviewing training-related employee data.

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

Trn Request (training request) (USF) Click to access the - Employee Training Request Data page and enter additional information.

 (USF) Click to print the Training Request Form (SF-182). The form is printed after you have completed and saved the request information.

Demand From Budget Training

In this group box, you link enrollments with a training demand that you defined in the Budget Training business process. With this link, the system can compute the ratio between the projected costs in your Budget Training business process and the actual costs that you track in the Administer Training business process.

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

If selected, the system displays all Budget Training demands with the following restrictions:

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

Catalog

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

If you select this check box and prompt for a demand ID, the system displays all Budget Training demands with the following restrictions:

- The course session start and end dates must be in the budget period of the demand.
- When the demand course value is *UNKNOWN*, the demand subcategory must include the current course.
- When the demand course value is *not UNKNOWN*, the demand course must be the same as the current course.
- When the course and the subcategory values for the demand are *UNKNOWN*, the demand category must include the current course.

Population and Catalog

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

- The course session start and end dates must be in the demand budget period.
- For individual demands, the employee ID of the demand must be the same as the student ID for the enrollment.
- For general demands, the student ID of the enrollment must be on both the Demand Department list and the Demand Job list.
- When the demand course value is *UNKNOWN*, the demand subcategory must include the current course.
- When the demand course value is *not UNKNOWN*, the demand course must be the same as the current course.

Demand ID

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

(FRA) France

For French companies, enter the additional enrollment information that is required for French Training Report 2483.

Training Leave

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

Part Time Course

Select if you're enrolling the employee in a sandwich course, where the employee gains work experience while studying.

Time Spent at Training

If you selected the Part Time Course check box, enter the amount of time that is spent training and the unit in which the time is recorded, such as *Hour* or *Day*. You can enter this field only if the student's status is *Incomplete*.

See Also

Chapter 8, “Enrolling and Waitlisting Students,” Administering Training Letters, page 136

Chapter 5, “Defining Training Requirements,” Demand Methods, page 62

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Adding Nonemployees

Enrolling Students by Department Demand

This section discusses how to:

- Enroll students by department.
- View subscribed employees.

See Also

Chapter 5, “Defining Training Requirements,” Defining Global, Departmental, and Employee Training Demand, page 70

Pages Used to Enroll Students by Department Demand

Page Name	Object Name	Navigation	Usage
Department Demand	TRN_GNRL_DMND_SUBS	Enterprise Learning, Student Enrollment, Enroll by Department Demands, Department Demand	Enroll students (employees who qualify for training according to a set criteria) in a course session. Add students (who are included in a department demand) to a waiting list.
Department Demand - Demands Search Criteria	TRN_GN_DMND_CR_SEC	Click the Demands Filter link on the Department Demand page.	Limit the selection to a specific course or courses within a particular category or subcategory. List employees who have subscribed to a training course and who belong to the specified business unit and department for sessions that occur within the budget period.
Department Demand - Employee/Course Details	TRN_GN_DMND_SEC	Click the Details link on the Department Demand page.	View information about the course session that you selected on the Department Demand page.
Department Demand - Subscriptions	TRN_GNRL_TRAIN_SUB	Enterprise Learning, Student Enrollment, Enroll by Department Demands, Subscriptions	View the employees who were successfully subscribed to the courses and sessions that you selected on the Department Demand page. Check their status and the course enrollment dates.
Subscriptions - Employee/Course Details	TRN_TRAINING_SEC	Click the Details link on the Department Demand - Subscriptions page.	View information about the selected course session.

Enrolling Students by Department

Access the Department Demand page.

Department Demand page

- Budget Period** Select the budget period for the department demand to enroll in a course session.
- Demand ID** Select the demand ID to include in the enrollment process. The training demand includes information about the course in which students should be enrolled, course category classifications, budget period dates, and employee qualification criteria.
- Department** Select the department code for the students to enroll in a session. You can select only from the departments that are included in the demand ID that you specified. When you move out of the Department field, the system makes the Display Demands button available.
- Demands Filter** To limit the search further, click this link to access the Demands Search Criteria page and specify a category or subcategory from your training catalog. You can also specify a course.
- To limit demands using selection criteria after you click the Display Demands button, cancel the page and start again.
- Display Demands** Click to populate the Matching Employees scroll area with employees who meet the selection criteria (such as department and job codes) that are defined in the demand ID.
- Matching Employees**
- Do** Select this check box to enroll or waitlist an employee for the selected course or session.

Course Code	Select the course the employee is to attend. The initial value is the department demand ID that you selected.
Session # (session number)	Select a session number for the selected course code. You must select a session within the budget period for this demand. When you move out of this field, the system displays the start and end dates of the session and selects the Catalog check box if the session is in your training catalog.
Details	Click to access the Enroll by Department Demand - Employee/Course Details page and view the employee's name and the details of the course session that you selected.

Subscribe Demand

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

Attendance	Select from: <i>Enrolled.</i> <i>Crse Wait</i> (course waitlisted). <i>Sessn Wait</i> (session waitlisted). If you've already found matching employees and have reset the Attendance field, the system clears any session information that you entered.
Prerequisite Checking	Select to check if students have met the prerequisites for a course specified in the Course table. Students who haven't met the prerequisites won't be enrolled in the course when the system processes the request.
Subscribe	Once you have selected the employees to enroll or add to the waiting list, click this button. Depending on the Attendance value that you selected, the system enrolls or waitlists students for whom you selected the Do check box.

Viewing Subscribed Employees

Access the Enroll by Department Demand - Subscriptions page.

Department Demand

Subscriptions

Budget Period:

Business Unit:

Department: 0/ 0

Training Scheduled

Find | View All First 1 of 1 Last

Demand	EmplID	Attendance	Course	Session #	Start Date	End Date
--------	--------	------------	--------	-----------	------------	----------

Enroll by Department Demand - Subscriptions page

The system lists employees who were enrolled or waitlisted in the courses and course sessions that you selected on the Department Demand page.

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

Enrolling by Employee Demand

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

See Also

[Chapter 5, "Defining Training Requirements," Demand Methods, page 62](#)

[Chapter 8, "Enrolling and Waitlisting Students," Enrolling Students by Department Demand, page 143](#)

Pages Used to Enroll by Employee Demand

Page Name	Object Name	Navigation	Usage
Employee Demands	TRN_EMPL_DMND_SUBS	Enterprise Learning, Student Enrollment, Enroll by Employee Demands, Employee Demands	Select approved employee demands to enroll in the requested courses. You set up courses on the Employee Demand Profile page or the Employee Demand Course page.
Employee Demands - Demands Search Criteria	TRN_EE_DMND_CR_SEC	Click the Demands Filter link on the Employee Demands page.	Limit the selection to a course or courses in a particular category or subcategory.
Employee Demands - Employee/Course Details	TRN_EE_DMND_SEC	Click the Details link on the Employee Demands page.	View information about the selected course session.
Employee Demands - Subscriptions	TRN_EMPL_TRAIN_SUB	Enterprise Learning, Student Enrollment, Enroll by Employee Demands, Subscriptions	View employees who were successfully subscribed to the courses and sessions that you indicated on the Employee Demands page. Check status and course enrollment dates.

Enrolling Students by Group

This section discusses how to:

- Enroll or waitlist group members.
- View subscribed students.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Groups,” Creating a Group

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Groups”

Pages Used to Enroll Students by Group

Page Name	Object Name	Navigation	Usage
Enroll Group	TRN_GRP_ENROLL_GBL	Enterprise Learning, Student Enrollment, Enroll Group	Select students from a group to subscribe (enroll or waitlist) to a course.
Comments	TRN_GRPDESCGBL_SEC	Click Group Comments on the Enroll Group or Group Enrollment - Subscriptions page.	View a description of selected group and the criteria used to build the group.
Enroll Group - Name or ID Search	TRN_GRPSON1GBL_SEC	Click the Search by Name or ID link on the Enroll Group page.	Select members of the group to enroll or add to waiting lists.
Enroll Group - Employee/Course Details	TRN_GRP_ENRGBL_SEC	Click the Details link on the Enroll Group page.	View details of the course session for which the selected employee is enrolled or waitlisted.
Enroll by Group - Subscriptions	TRN_GRP_SUBS_GBL	Enterprise Learning, Student Enrollment, Enroll by Group, Subscriptions	View the students who were subscribed to the courses and sessions indicated on the Enroll Group - Employee/Course Details page.
Subscriptions - Name or ID Search	TRN_GRPSON2GBL_SEC	Click the Search on Name or ID link on the Group Enrollment - Subscriptions page.	Select the members of the group whose details you want to view.

Enrolling or Waitlisting Group Members

Access the Enroll Group page.

The screenshot shows the 'Enroll Group' page. At the top, there are two tabs: 'Enroll Group' (selected) and 'Subscriptions'. Below the tabs, there are several search fields: '*Group ID:' with a magnifying glass icon, '*Course:' with a magnifying glass icon, 'Session #:', 'Facility:', and 'Language:'. There are also checkboxes for 'Prerequisite Checking' and 'Subscribe All'. Below these, there is a 'Search by Name or ID' option and two buttons: 'Refresh Search Fields' and 'Load Students'.

Enroll Group page

Group Comments

Click to access the Comments page and view a description of the group and the group definition.

Course

When you move out of this field, the system displays the course name. If the course is multilingual, a message tells you to select a course session.

Session # (session number)

This field is required for multilingual courses that don't have course waiting lists. Be sure to select a session in a language that is appropriate for the group.

Facility	If you completed the Session # field, the system completes this field using values from the Course Session Table - Location, Instructor page. If you didn't specify a facility when you created the session, the field is blank. This field is unavailable for entry.
Language	If you completed the Session # field, and the course is multilingual, the system completes this field from the Course Session table. This field is unavailable for entry.
Prerequisite Checking	Select to check whether students meet the course prerequisites. Students are added to waiting lists even if they don't meet the prerequisites, and you can decide if they should attend the course.
Subscribe All	Select to select the Do check box for students who are listed in the Matching Employees scroll area.

Student Batch Controls

The system loads students into this page in batches. You determine the number of rows in a batch in the Max Number of Rows in Scrolls (maximum number of rows in scrolls) field on the Installation Table - Third Party/System page. You manage the display of batches using filters and navigation buttons. Filters enable you to enter search criteria for identifying a group of students.

Click the Search by Name or ID link to access the filter fields. After entering information in the filter fields, click the Load Students button to populate the page with the IDs of students who meet the search criteria.

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

Matching Employees

When you click the Load Students button, the system populates the Matching Employees scroll area with students who match the search criteria you entered. The system indicates visible rows compared to the total number of rows. For example, *12 to 20 of 56* means that rows 12 to 20 are displayed out of a total of 56 rows.

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

Do	Select to update the selected student's training data with the current data. For example, if you set the Attendance field value to <i>Enrolled</i> and complete the session details, the system enrolls the student only if the Do check box is selected. The system ignores the rows of data where the Do check box is cleared.
Student ID	Displays the employee or non-employee ID. To display the student's full name, click the Details link.
Course	Displays the course code that you selected. To select a different course for the group, update the Course field at the top of the page and rerun the search.
Session # (session number)	If a student's Attendance field value is <i>Enrolled</i> or <i>Sessn Wait</i> , the system displays the session number in this field. You can change the course session without affecting other students in the list.

For students with an Attendance field value of *Crse Wait*, this field is blank. To add the student to a course session, select the session from the list. When you move out of the field, the system clears the Attendance field; you must set it to *Sessn Wait* or *Enrolled*.

If the student has completed the course, the system displays the session number and makes the field unavailable.

Start Date and End Date

If the student's Attendance field value is set to *Enrolled*, *Sessn Wait*, or *Completed*, the system populates these fields from the Course Session table and makes them unavailable.

Already Subscribed

The system selects this check box if a student has already been enrolled in a course session or added to a waiting list through the Group Enrollment component. The check box is for information only; you can still change the subscription information on the page. For example, if a student has been previously added to a course waiting list, you can add the student to a session waiting list from this page by updating the Attendance and Session # fields.

If you subscribed the student using a different option (for example, if you used Course Session Enrollment to manually enroll the student), the system doesn't select this check box. You can't modify the Attendance or the Session # fields for that student.

Attendance

If a student is waitlisted for the course, enrolled in a course session, or has completed the course, this field is initially populated with the Attendance field value from the student's training records. If the course isn't included in a student's training records, the system sets this field's value as follows:

Crse Wait: The student is on the course waiting list. The system uses this value if the student hasn't been enrolled or waitlisted for the course and the Session # field is blank. To enroll or add the student to a session waiting list, select *Enrolled* or *Sessn Wait* and optionally complete the Session # field.

Enrolled: The student is enrolled in the selected course session. When you first click the Load Students button, you see *Enrolled* only if the student was previously enrolled in the course session (the system doesn't enroll students on this page).

Sessn Wait: The student is on the course session waiting list. The system uses this value if a student hasn't been enrolled or waitlisted for the course, and you specify a session number. To enroll the student in the session, select *Enrolled*. If you have reached the maximum number of students for the course session, you get a warning message.

Completed: The student has completed the course. Once a student has completed a course, you can't enroll that person in the course again, and all fields in that row are unavailable. You can't select *Completed* on this page. You need to update the course session status on the Course Table - Course Profile page.

Student/Course Details

Click to access the Employee/Course Details page and view the student's full name and the course session details.

Viewing Subscribed Employees

Access the Enroll by Group - Subscriptions page.

Enroll by Group - Subscriptions page

Group Comments

Click to access the Comments page and view a description of the group and the group definition.

Student Batch Controls

The system loads students into this page in batches, similar to the Enroll Group page.

Training Scheduled

When you click the Load Students button, the system populates the Training Scheduled scroll area with students who match the search criteria that you entered. The system indicates visible rows compared to the total number of rows. For example, *12 to 20 of 56* means that rows 12 to 20 are displayed out of a total of 56 rows.

Prerequisites Met

If you selected this check box on the Enroll Group page, the system checks to see if students have met the course prerequisites. When you display the Subscriptions page, the system selects this check box if the student has met the course prerequisites and clears it if the student has not.

You set up course prerequisites on the Course Table - Prereqs, Goals page (course table - prerequisites, goals page).

Managing Waiting Lists

This section discusses how to:

- Add students to waiting lists.
- Enroll students automatically.

Pages Used to Manage Waiting Lists

Page Name	Object Name	Navigation	Usage
Course Wait List	COURSE_WAIT_LIST	Enterprise Learning, Student Enrollment, Create/Update Course Wait List	Add students to waiting lists and assign the enrollment status.
Course Waitlist Details	CRSE_WAITLIST_SEC	Click the student's name on the Course Wait List page.	View details of the course or course session for which the selected student is waitlisted.
Course Auto Enroll	COURSE_AUTO_ENROLL	Enterprise Learning, Student Enrollment, Course Session Auto Enrollment, Course Auto Enroll	Enroll students in a course session automatically.

Adding Students to Waiting Lists

Access the Course Wait List page.

Course Wait List page

You can add employees and non-employees to a waiting list. Insert additional rows to add students.

Name The system completes the name when you select the employee ID. Click the student's name to access the Course Waitlist Details page and view more information about the selected course session.

Attendance Select from:

Crse Wait: Enroll the student in any session of the course that becomes available. You haven't set up any open sessions for the student to request.

Sessn Wait: Waitlist the student for a particular course session. To select this status, you must have created the session in the Course Session table and given it a status of *Active*. Students with a *Sessn Wait* status have priority over students with a *Crse Wait* status.

Note. For multilingual courses, you must use *Sessn Wait* and select a session in the student's language.

Letter Code PeopleSoft Human Resources enters a default letter code according to the student's waiting list status. For waitlisted students, the letter code is WTC; for session waitlisted students, it is WTS. If you've created waiting list form

letters, you can generate the letters once you save the information you’ve entered on this page. You create letter codes on the Standard Letter Table page.

Waitlist Dt

Initially populated by the system date. You can override this value if the student has requested the course on a different date. The system uses this date to enroll students, from the oldest date to the most recent.

The system sorts students by session number in ascending order. Within each session, it sorts students by status (session waitlist first and course waitlist second), waitlist date, and ID. Non-employees appear after employees, using the same sort sequence. The system also uses this sequence for automatic enrollment.

Session # (session number)

If you selected an Attendance value of *Sessn Wait*, select a session number. When you leave this field, the system completes the Start Date, Facility, and Language (if it’s a multilingual course) fields.

Status Date

Displays the system date, usually today’s date.

Enrolling Students Automatically

Access the Course Auto Enroll page.

Course Auto Enroll

Course:2SESS2 Sessions

Waiting:0

Auto-Enrollment

Session #:

Max Students:0

Attendance

Find | View All

First1 of 1Last

Student Name	ID	Short Name	Status Date	Waitlist Dt	Sessn	Letter Code
--------------	----	------------	-------------	-------------	-------	-------------

Course Auto Enroll page

Before you can enroll students in course sessions, you must have already created the session in the Course Session table, given it a status of *Active*, and entered a maximum number of students per session.

If you’ve set up lists for students who are waiting for courses or sessions, you can streamline the enrollment process by using automatic system enrollment.

When a student is automatically enrolled and you've given the student a status of *Sessn Wait* for several sessions of a course and one status of *Crse Wait*, the system deletes all the other data rows on the waiting list for this student for this course.

Note. If you're managing training budgets, the Course Auto Enroll process links costs to the appropriate department and demand in the Budget Training business process. This isn't necessarily the department in which the employee works, as specified on the job record, but it is the department to be billed for the employee's training costs.

Auto-Enrollment

Session # (session number) To start automatic enrollment, select a session number.

When you move out of the field, the system issues one of two messages:

- If the session is full, then the message says that the session is over-enrolled. Click OK and select another session number, or click Cancel.
- If the session isn't full, the message indicates how many slots are available in the session. Click OK. The system enrolls students up to the maximum number allowed for the session, as shown in the Max Students (maximum number of students) field.

The system first enrolls students with an Acceptance field value of *Sessn Wait* where the Sessn (session) field value matches the selected session number.

Attendance

When you first open this page, the Attendance group box shows all employees and non-employees who are on the session waiting lists or the course waiting list. Students are sorted using the same sequence as on the Course Wait List page.

Once you select a session number, the system updates student details. All students who are enrolled in the course session have a status of *Enrolled*. The system also displays a Letter Code value of *CON*, so that you can generate form letters informing students of their enrollment.

Once you've saved the Course Auto Enroll page, you can move to the Course Session Enrollment page to make any adjustments to the enrollees in this session.

See Also

Chapter 8, "Enrolling and Waitlisting Students," Administering Training Letters, page 136

Moving Students Between Course Sessions

Use the Express Rescheduling component to review and update information about students who are enrolled in active course sessions or are on waiting lists. You can move students from one session to another, change their enrollment status, and designate a form letter to send. Although you can change student status, you can't add or remove students from a course.

Page Used to Move Students Between Course Sessions

Page Name	Object Name	Navigation	Usage
Express Rescheduling	COURSE_RESCHEDULE	Enterprise Learning, Student Enrollment, Reschedule Between Sessions	Move students between course sessions.

Moving Students Between Sessions

Access the Express Rescheduling page.

Express Rescheduling page

Session # (session number) Displayed for enrolled or waitlisted students. To enroll a student in a session, select the session number.

Status Values are:

Enrolled: Enroll a student in the session that you selected in the Session # field.

Crse Wait

Sessn Wait

Status Date When you select a different status for a student, the system updates this field.

Letter Code This code changes according to the status. The next time you generate training letters, the system creates a letter of the type that is defined by the letter code.

Note. If the number of enrolled students in a session exceeds the maximum number allowed, you get a warning message.

See Also

Chapter 8, “Enrolling and Waitlisting Students,” Administering Training Letters, page 136

Running Enrollment and Waiting List Reports

This section discusses how to run the reports provided for:

- (USF) Tracking training requests.
- Managing course waiting lists.

Pages Used to Run Enrollment and Waiting List Reports

Page Name	Object Name	Navigation	Usage
Runctl SF182	RUNCTL_SF182	Enterprise Learning, Training Reports, SF182, Runctl SF182	(USF) Provides a standardized mechanism for generating SF182 reports to request, authorize, and detail estimates costs and billing as well as certify training programs for employees. This is an SQR report.
Course Waiting List	RUNCTL_TRN003	Enterprise Learning, Course Reports, Course Waiting List	Lists students on all waiting lists for a course. This is a Crystal report.

CHAPTER 9

Tracking Student Training

This chapter provides an overview of tracking and discusses how to:

- Maintain student training data.
- (USF) Track federal training requests.
- Review training-related employee data.

Understanding Tracking

You can follow student progress in both internal and external (off-site) courses for both employees and non-employees, such as contractors or temporary workers. You can review and update all training-related employee data, such as education and certifications.

You can view training data for all students who have taken training courses or have other training data in the system.

You can search for training data by employee ID or student name. If you record alternate character names for employees, you can enter an alternate character name as well.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Languages,”
Working With Double-Byte Characters

Maintaining Student Training Data

This section discusses how to:

- Enter or review student and course information.
- Specify business unit and department billing information.
- Track and review requested courses.

When you add students to waiting lists and enroll them in sessions that are administered in-house, the system adds and updates data rows in the Student Training component. You can review and update that information.

To enroll or waitlist students in training course sessions, use the Course Waiting List page or the Student Course Enrollment - Course Session Enrollment page. When students have completed sessions, you can enter their course grades on this page.

Note. If you're working with training budgets, use the Student Training - Demand from Budget Training page to specify how outside courses are billed to a business unit and department. If you're reviewing a course on the Student Training pages for a course that the employee took in-house, the system uses the budget information that you specified in the Department group box on the Course Session Enrollment page (COURSE_ENROLLMENT).

Pages Used to Maintain Student Training Data

Page Name	Object Name	Navigation	Usage
Course Student Enrollment	COURSE_STUDNT_ENRL	Enterprise Learning, Training Budget, Student Enrollment, Enroll in Course, Course Student Enrollment	Review or enter student and course information.
Demand from Budget Training	COURSE_STUDNT_ENR2	Enterprise Learning, Training Budget, Student Enrollment, Enroll in Course, Demand from Budget Training	Specify how a course that a student has completed or is enrolled in should be billed to a business unit and department.
Student Training Summary	TRN_STUDNT_CRS_SUM	Enterprise Learning, Result Tracking, Review Training Summary, Student Training Summary	Review student training to determine whether students are receiving adequate training for their jobs or have taken course prerequisites. Useful for career and succession planning.

Entering or Reviewing Student and Course Information

Access the Student Training - Course Student Enrollment page.

Course Student Enrollment Demand from Budget Training

Course Information Find | View All First 1 of 1 Last

Allerseelen, Gregor EmplID: 0002 + -

Course Code: Course Title:

*Internal/External: External Facility: Language:

Session #:

Start Date: End Date:

School Code: School Name:

Student Information

☐ Prerequisites Met Date Needed:

*Attendance: Course Waitlist Status Date: 11/06/2002

Training Reason: Waitlist Date: 11/06/2002

Business Unit: DEU01 DEU BU Department: 21600 Sales

Grade: Letter Code: Letter Dt:

Student Training - Course Student Enrollment page (1 of 2)

▼ Australia

Study Bank Customize | Find | View All First 1 of 1 Last

	From Date	To Date	Study hrs/wk	Travel hrs/wk		
1					+	-

Student Training - Course Student Enrollment page (2 of 2)

You have specified a business unit and department information for billing. Now link the student course information to a demand ID in your budget training plan so that the system can process training costs against your training budget. If the student is taking or has taken an outside training course, enter information about how that course should be tracked as part of a demand ID. The system displays the complete training history for the selected employee or non-employee.

Course Information

For course sessions that are administered in-house, the system display data from the Course Session table and Course Session Enrollment page and makes some fields unavailable.

To enroll the student in a course that you don't administer in-house, insert a new row and fill in the fields.

Course Code and Course Title

If the course session is administered in-house, the system displays these values.

If you're adding information about a course that is not administered in-house, and if the course is in your Course table, select the course code. Otherwise leave the field blank and enter the course name in the Course Title field.

Internal/External	Displayed if you entered a course code. If the value isn't displayed, select <i>Internal</i> or <i>External</i> .
Facility, Language, Session # (session number), Min (minimum students), Max (maximum students), # Enrolled , (number enrolled), # Waiting (number waiting), and Letter Code	These fields apply only to course sessions that are administered in-house.
Start Date, End Date, Start Time, and End Time	If dates and times aren't displayed, enter them.
Letter Dt (letter date)	If you printed a letter with the code that is specified in the Letter Code field, the system displays the date that the letter was printed. This field applies only to course sessions that are administered in-house.
School Name and School Code	Enter the name of the school if there is no corresponding school code.
Student Information	
Prerequisites Met	Select to indicate that a student has met the required prerequisites or training before enrolling in a course.
Date Needed	Enter the date when the student should have completed this course.
Attendance	Displayed if the course session is administered in-house. Changing the status may affect session enrollments, so go to the Course Session Enrollment page to make other adjustments, such as moving a student from the waiting list into the course. You can update the status of enrolled students to <i>Completed</i> here or on the Student Course Enrollment - Course Session Enrollment page. If the course isn't administered in-house, select an attendance status. The values that you'll use most often are <i>Currently Attending</i> and <i>Completed</i>. If this training course is also in the employee career plan, once the status is <i>Completed</i>, the start date of the course appears in the Actual Completion Date field on the Career Plan Career Training Plan page.
Status Date	Initially populated by the system date.
Waitlst Dt (waitlist date)	Displayed if the value in the Attendance field is <i>Crse Wait</i> . This field applies only to courses that are administered in-house.
Business Unit and Department	Displayed if: • The course is administered in-house. • The course is administered outside of your organization and won't be administered using the Course Session Enrollment page. • The course information is new, regardless of whether it is administered in-house or outside.

- The student is a non-employee (the non-employee's business unit information comes from the Add Non-Employee component).

If the training is billed to a different business unit or department, select them here.

Note. For budget processing purposes, link the course to a demand ID on the Student Training - Demand from Budget Training page.

Grade

If the student has completed the course, enter a grade.

(AUS) Australia

The Australian government requires Study Bank tracking information on approved courses and training. Record weekly information on study and travel hours per employee.

Specifying Business Unit and Department Billing Information

Access the Demand from Budget Training page.

The screenshot displays the 'Demand from Budget Training' page. At the top, there are two tabs: 'Course Student Enrollment' and 'Demand from Budget Training'. Below the tabs, the user 'Allerseelen, Gregor' is identified as an 'Employee' with 'EmplID: 0002'. The 'Course Information' section includes fields for 'Course Code:', 'Session #:', 'Start Date:', and 'End Date:'. The 'Demand from Budget Training' section contains 'Search Criteria' with checkboxes for 'Population' and 'Catalog', a 'Demand ID' field, and a dropdown for 'France'. Under 'France', there are checkboxes for 'Training Leave' and 'Part Time Course', and a 'Time Spent at Training' field with a unit selector set to 'Hour'.

Demand from Budget Training page

Demand from Budget Training

In this group box, you link enrollments with a training demand that you defined in the Budget Training business process. With this link, the system computes the ratio between the planned costs in your Budget Training business process and the actual costs for training that you track in Administer Training.

To locate the right demand ID, use the check boxes under Search Criteria:

- Select Population to search for demands that match the employee's department, job code, and competencies.
- Select Catalog to search for demands that match the course code.

- Select both Population and Catalog to search for all possibilities.

(FRA) France

Training Leave	Select if the training course is to be taken during an employee's leave.
Part Time Course	Select if you're enrolling the employee in a sandwich course, where the employee gains work experience while studying.
Time Spent at Training	If you selected Part Time Course, enter the amount of time that was spent in training and select the unit in which the time is recorded: <i>Hour</i> or <i>Day</i> . You can complete this field only if the student has a status of <i>Incomplete</i> .

See Also

[Chapter 5, "Defining Training Requirements," Demand Methods, page 62](#)

(USF) Tracking Federal Training Requests

When you request training, you assign a status to the request, and the system routes it to authorizing and approving officials according to your agency's requirements. After reviews and approvals, the system enrolls or waitlists the students.

The following pages are used for training tasks:

- To request training, use the Student Course Enrollment - Course Session Enrollment page.
- To directly enroll or waitlist students in training course sessions, and to enter students' grades for completed sessions, use the Course Wait List page or the Student Course Enrollment - Course Session Enrollment page.
- To review and print an employee's training request information, use the Student Course Enrollment - Course Session Enrollment page or the Student Training Summary page.

See Also

[Chapter 8, "Enrolling and Waitlisting Students," Page Used to Enroll Students Manually, page 139](#)

[Chapter 8, "Enrolling and Waitlisting Students," Pages Used to Manage Waiting Lists, page 153](#)

[Chapter 9, "Tracking Student Training," Pages Used to Maintain Student Training Data, page 160](#)

Page Used to Track Training Requests

Page Name	Object Name	Navigation	Usage
Course Session Enrollment	CRSE_ENRL_WL	Enterprise Learning, Student Enrollment, Enroll Individually, Course Session Enrollment	Track and review the courses that an individual student has requested and print the Training Request Form (SF182).

Tracking and Reviewing Requested Courses

Access the Course Session Enrollment page.

Course Session Enrollment

Course: 28ESS 2 Sessions **Session #:** 0002 Active

Start Date: 01/02/2000 **Start Time:** 8:00AM

Facility: **Language:**

Min Students: 2 **Max Students:** 6 **Prerequisite Checking**

Enrolled: 0 **# Waiting:** 0 [Transfer-Course Session Setup](#)

Attendance Find | View All First 1 of 1 Last

EmpID:

***Enrollment/Attendance:** **Status Date:** 11/06/2002

Training Reason: ☐ Prerequisites Met

Letter Code: **Date Letter Printed:** **Grade:**

Department

Business Unit:

Department:

Course Session Enrollment page (1 of 2)

Demand from Budget Training

Search Criteria:

☐ Population ☐ Catalog **Demand ID:**

▼ **France**

☐ Training Leave ☐ Part Time Course

Time Spent at Training:

Course Session Enrollment page (2 of 2)

Course, Session #, (session number) and **Attendance**

To add a course, insert a row and select the course, session number, and attendance status.

Trn Request

Click this button to view the USF - Employee Training Request page and enter or view training request information.



Trn Request

(training request)

Click to print the Training Request Form (SF-182). The form is printed after you have completed and saved training request information.

Reviewing Training-Related Employee Data

As you administer training programs, you can review and update other employee training-related information, such as education, competencies and languages, and the results of tests. You can use the following pages to track this information:

- Competencies
- Education
- Licenses/Certifications
- Memberships
- Languages
- Test Results

Note. (USF) The Education page is for users of the PeopleSoft commercial application only and doesn't appear in the menu for U.S. federal users.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Tracking Employee Competencies and Accomplishments”

Running Student Training Reports

This section discusses how to generate reports of employee training records.

Pages Used to Run Student Training Reports

Page Name	Object Name	Navigation	Usage
Student Training History	RUNCTL_TRN020	Enterprise Learning, Training Reports, Student Training History	Lists the courses and sessions completed by a student. This is a Crystal report.
Course Attend. School Program	RUNCTL_TRN021	Enterprise Learning, Training Reports, Training Programs, Course Attend School Program	Lists the training program for an employee. This is an SQR report.

CHAPTER 10

Tracking Training Costs

This chapter provides an overview of training cost tracking and discusses how to:

- Define and track reimbursable tuition expenses.
- Calculate and track student costs.
- Update actual training costs.
- Review training costs.
- (FRA) Review employee session costs.

Understanding Training Cost Tracking

This section lists common elements and discusses student reimbursement processing.

Common Elements Used in This Chapter

Data Override and Override	Select to manually change costs that are associated with a student for a specific course session. Cost fields become available.
	Note. Once you change the default values on a page, you cannot select the Data Override check box again.
	Warning! When you rerun the Compute Student Cost process (RUNCTL_TRN013) with this check box selected, the system overwrites the data on that page with new calculation results.
EE Qty (employee quantity)	Defines the number of units of equipment or materials. Can also define the number of units of the Expense Type value on the page that the employee used as part of the course session.
Per Employee Cost	Displays the costs per employee. The appropriate currency is defined in the field next to this field. You can override the costs by selecting the Data Override check box.
(FRA) Financed Cost, Financing Fund, and Financing Department	Use these fields to define the additional facility information that is used to generate the French Training Report 2483. Enter the financed cost if the student's training is financed by an external organization.

Select the financing fund that the financing department uses to finance the student's training costs. Set up financing funds in the Vendor table.

Select the department that is financing the student's training costs.

Student Reimbursement Processing

You can use PeopleSoft Human Resources to handle student reimbursements for external course expenses. The system calculates reimbursable amounts according to the schedules that you create. In the Budget Training business process, the system updates training costs as students complete courses and are reimbursed for training expenses and posts those costs against your organization's training budget.

Defining and Tracking Reimbursable Tuition Expenses

This section discusses how to:

- Define reimbursable expenses and percentages.
- Track student reimbursements.

Note. The reimbursement information that you track here is for informational purposes only and does not affect payroll processing in PeopleSoft Human Resources Management (HRMS).

Pages Used to Define and Track Reimbursable Expenses

Page Name	Object Name	Navigation	Usage
Tuition Expense Type Table	TRN_EXPNS_TYP_GBL	Set Up HRMS, Product Related, Enterprise Learning, Tuition Expense Type, Tuition Expense Type Table	Define the types of training expenses that are reimbursable, define the percentage that is reimbursable, and set up a reimbursable limit.
Tuition Reimbursement	TRN_TUITION_REIMB	Enterprise Learning, Cost Analysis, Maintain Tuition Reimbursement, Tuition Reimbursement	Track reimbursable expenses.

Defining Reimbursable Expenses and Percentages

Access the Tuition Expense Type Table page.

Tuition Expense Type Table

Tuition Expense Type: K01EXPN

Tuition Expense Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

*Description: Books/Supplies

Short Description: Books/Supp Cost Type:

Percent Reimbursable

Work-Related Course: 50 Non-Work-Related Course: 0

Reimbursable Limit

☐ Limited Reimbursement

Amount: Currency: USD Cost Unit: Pers/Hour

France

2483 Type: ☐ Chargeable

☐ Limited Amount

Limit Amount: USD Cost Unit: Pers/Hour

Tuition Expense Type Table page

Cost Type Select *Direct* or *Indirect*.

Percent Reimbursable

Work Related Course and Non-Work-Related Course Enter the percentage of the expense that is reimbursable. You can have different percentages for work-related and non-work-related courses.

Reimbursable Limit

Define reimbursable limits to help track tuition reimbursement costs.

Limited Reimbursement Select to limit the amount that the students are reimbursed. The system makes the Reimbursable Limit Amount and Cost Unit fields available.

Reimbursable Limit Amount and Cost Unit Enter the reimbursable limit and select the associated unit.
For example, you can specify a flat cost, such as USD 100, or limit the amount that is reimbursed for a period, such as USD 100, per person per year.

(FRA) France

Define additional expense data for 2483 report requirements.

2483 Type Select an expense type. Options are *Equipment*, *Furniture*, *Instructor*, *Lodging*, and *Non-Instruct* (non-instructor-related expenses).

Chargeable	Select if the amounts for this expense type are chargeable and can be reported on the 2483 report.
Limited Amount	Select if the expense amount is restricted to a specific value. The system makes the Limit Amount and Cost Unit fields available.
Limit Amount and Cost Unit	Enter the limit amount and select the associated unit. For example, to limit hotel lodging to FRF 2000 per person per day, enter <i>2000</i> in the Limit Amount field and select <i>Pers/Day</i> in the Cost Unit field.

See Also

Chapter 12, “(FRA) Producing the French Training Report 2483,” page 189

Tracking Student Reimbursements

Access the Tuition Reimbursement page.

Tuition Reimbursement

Jones, Rebekah Employee **EmplID:** K0G001

Course: K012 Project Management **Session #:** 0001

Start/End Date: 02/15/1999 02/23/1999

Totals

0.00	0.00	USD
------	------	-----

Expense Customize | Find | View All | First 1 of 1 Last

Date	Amount	Expense Type	Reimb Date
			11/06/2002

Tuition Reimbursement page:

You can track all expense types for which you usually reimburse students, including tuition, textbooks, and ancillary materials.

You can enter and update tuition reimbursements only for courses where students have a status of *Enrolled*, *Currently Attending*, or *Completed*. You update (or the system updates) the student status on the Course Session Enrollment and Student Training pages.

Totals

Displays the sum of the amounts in the Expense Amount field on the Date tab and the sum of the amounts in the Amount Reimbursed field and the currency code from the Amount tab.

Date Tab

Expense Type Select an expense type from the types that you created on the Tuition Expense Type Table page.

Amount Tab

Work LTD (work-related) and Amount Reimbursed

Select if the course is work-related.

The system calculates the amount that is to be reimbursed to the student based on the percentages that you entered on the Tuition Expense Type table. You can set up different percentages for work-related and non-work-related courses. If you have set a reimbursable limit on the Tuition Expense Type table, and you select this check box, the system calculates the amount that is to be reimbursed. If the limit is exceeded, the system displays a warning message and adjusts the Amount Reimbursed value. You can continue with the reduced amount or update the amount reimbursed.

See Also

[Chapter 3, “Setting Up Training Costs,” Setting Up Training Cost Currency, page 13](#)

Calculating and Tracking Student Costs

To calculate student costs for a course session, run the Compute Student Costs process. This process splits out the training costs to the employee level using cost information that is specified at the course, course catalog, and course session levels.

Once you’ve run this process, you can view the results in the Track Student Cost component. Adjustments that you make to the cost information in that component override the cost information that is calculated by the process.

The process calculates the training cost for each employee in the specified session, for the specified budget period, and populates the tables that store employee training cost component information as follows:

Cost Component	Table
Salary	TRN_EESAL_COST
Vendor	TRN_EEPROV_COST
Facility	TRN_EEFACIL_COST
Equipment	TRN_EEEQUIP_COST
Instructor	TRN_EEINST_COST
Employee Expense	TRN_EEEXPN_COST
Session Expense	TRN_SSEXPN_COST

This section discusses how to:

- Run the Compute Student Cost process.
- (FRA) Review and update vendor costs.

Pages Used to Calculate and Track Student Costs

Page Name	Object Name	Navigation	Usage
Compute Student Cost	RUNCTL_TRN013	Enterprise Learning, Cost Analysis, Calculate Student Cost, Compute Student Cost	Run the Compute Student Costs process before you review or update your actual training costs at the employee level. This process computes student costs by budget period for the course sessions that you specify as part of your process parameters.
Track Student Costs - Salary	TRN_EE_SESSN_CST1	Enterprise Learning, Cost Analysis, Maintain Student Costs, Salary	Review the employee salary costs that are associated with a course session and budget period.
Track Student Costs - Vendor	TRN_EE_SESSN_CST3	Enterprise Learning, Cost Analysis, Maintain Student Costs, Vendor	Review and update the vendor costs resulting from the Compute Student Cost process.
Track Student Costs - Facility	TRN_EE_SESSN_CST5	Enterprise Learning, Cost Analysis, Maintain Student Costs, Facility	Review and update the facility costs resulting from the Compute Student Cost process.
Track Student Costs - Equipment	TRN_EE_SESSN_CST7	Enterprise Learning, Cost Analysis, Maintain Student Costs, Equipment	Review and update training equipment and materials costs resulting from the Compute Student Cost process.
Track Student Costs - Instructor	TRN_EE_SESSN_CST4	Enterprise Learning, Cost Analysis, Maintain Student Costs, Instructor	Review and update the training instructor costs resulting from the Compute Student Cost process.
Track Student Costs - Employee Expense	TRN_EE_SESSN_CST2	Enterprise Learning, Cost Analysis, Maintain Student Costs, Employee Expense	Update the employee expense costs resulting from the Compute Student Cost process.
Track Student Costs - Session Expense	TRN_EE_SESSN_CST6	Enterprise Learning, Cost Analysis, Maintain Student Costs, Session Expense	Update the expense costs resulting from the Compute Student Cost process.

Page Name	Object Name	Navigation	Usage
EE Sessn Cost Summary (employee session cost summary)	RUNCTL_TRN032	Enterprise Learning, Training Reports, EE Sessn Cost Summary, EE Sessn Cost Summary	Run the EE Sessn Cost Summary report (TRN032). This report lists the costs that are associated with an employee who is attending a course. Costs are for salary, vendor, facility, equipment, instructor, employee expense, and session expense. This is an SQR report. Note. You must run the Compute Student Cost process before you run this report. The EE Session Cost Summary job runs two processes to produce the report: • EE Session Costs (HR_TRNEECOST). This is an application engine process that extracts the costs and stores them in a temporary table (PS_TRN032_TAO). The system runs this process first to generate the data for the report. • EE Session Cost Summary. This is an SQR process that generates the report using the data in the temporary table.

Running the Compute Student Costs Process

Access the Compute Student Cost page.

Compute Student Cost

Run Control ID: GN2
[Report Manager](#)
[Process Monitor](#)

Run

Report Request Parameters:

Budget Period:

From Date: Thru Date:

☐ Cancelled ☐ Completed ☐ Incomplete
☐ No Show ☐ Enrolled ☐ Dropped

Course Information

Find | View All First 1 of 1 Last

*Course Code	*Session #	Last Proc Dt	Split	Override	
			☒	☐	+ -

Compute Student Cost page

From Date and Thru Date
(through date)

When you select a budget period, the from and through dates are populated with values from the Budget Period Table page.

**Cancelled, Completed,
Incomplete, No Show,
Enrolled, and Dropped**

Select to include students with each status for the selected course and session.

Course Information

Course Code

The system displays courses that have completed sessions for the selected budget period only.

Session # (session number)

Select from the list of completed sessions.

Last Proc Dt (last process date)

Displays the date that you last ran the Compute Student Cost process for the specified course session and budget.

Split

Select to proceed with the process and populate the Track Student Cost pages with the process calculation results.

Override

The process does not automatically alter costs entered manually into the Track Student Costs page (when the Data Override check box is selected on that page). To force the process to store computed costs into the Employee Training Cost component, select this check box.

See Also

[Chapter 3, “Setting Up Training Costs,” page 9](#)

[Chapter 5, “Defining Training Requirements,” page 61](#)

PeopleTools PeopleBook: PeopleSoft Process Scheduler

(FRA) Reviewing and Updating Vendor Costs

Access the Track Student Costs - Vendor page.

Track Student Costs - Vendor page

Define additional vendor information to be tracked for legal reporting.

Certified, Billed, and Chargeable

For legal reports, select any check box that is applicable.

Date Entered

Enter date that the invoice was entered for the vendor.

Agreement Date and Company

Enter the agreement date and the name of the company that signed the agreement.

See Also

[Chapter 3, “Setting Up Training Costs,” Setting Up Training Cost Currency, page 13](#)

[Chapter 12, “\(FRA\) Producing the French Training Report 2483,” page 189](#)

Updating Actual Training Costs

The Update Planned and Real Costs process updates the actual training costs that you're tracking in the Administer Training business process. You can post these costs against your training budget in the Budget Training business process.

Once you run the Update Planned and Real Cost Process, you can examine how you've spent your training budget, using online inquiry pages that detail the budgeted costs for your organization and any unbudgeted costs that you incurred as part of training your employees. Also, you can look at how your organization's total budgeted costs compare to what you spent on training at the end of your budget period, or at any point along the way, to examine how your projected expenditures compare to what you've spent.

Note. Run this process only if you have set up a training budget using the Budget Training business process and have been tracking actual training costs in the Administer Training business process.

Page Used to Run the Update Planned and Real Cost Process

Page Name	Object Name	Navigation	Usage
Update Planned and Real Cost	RUNCTL_TRN012	Enterprise Learning, Cost Analysis, Calculate Planned/Real Costs, Update Planned and Real Costs	Run the Update Planned and Real Cost process.

Running the Update Planned and Real Cost Process

Access the Update Planned and Real Cost page.

Update Planned and Real Costs page

Budget Period

You can update costs for any predefined budget period, but you'll want to run the process only against the current budget period, because you need to have recorded actual training costs to obtain meaningful cost results. You can run the process anytime during your current budget period to see how your projected training spending compares to your actual expenditures.

Note. The budget period needs to be frozen for the process to execute properly.

Base Currency

When you move out of the Business Unit field, the system displays the base currency for that business unit. When the system calculates the costs for this budget period and business unit, it converts the costs to the base currency shown here. Then you can compare your training expenditures and budget amounts in the same currency.

When the system executes the Update Planned and Real Costs process, it calculates totals for all cost elements for each training demand that is associated with the selected budget period and business unit and compares the totals to the total training budget.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

[Chapter 6, “Planning Training Budgets,” Creating Global Scenarios, page 94](#)

Reviewing Training Costs

This section discusses how to:

- Review training costs.
- Review non-budgeted training costs.
- Compare budgeted costs to actual costs.

Pages Used to Review Training Costs

Page Name	Object Name	Navigation	Usage
Budgeted Cost	TRN_BDGT_ACT_COST	Enterprise Learning, Cost Analysis, Review Costs, Budgeted, Budgeted Cost	Review budgeted costs compared to actual training costs.
Unbudgeted Cost	TRN_NOTBDGT_COST	Enterprise Learning, Cost Analysis, Review Costs, Unbudgeted, Unbudgeted Cost	Review current unbudgeted training costs. Costs can include projected costs without any actual expenditure, if you have not spent the projected amount.
Summary Cost	TRN_CMPSUMMARY_COST	Enterprise Learning, Cost Analysis, Review Costs, Summary, Summary Cost	Compare budgeted and actual training cost totals.

Reviewing Training Costs

Access the Budgeted Cost page.

Budgeted Cost

Budget Period:K1999CALYR

Business Unit:GBIBU

Dept View ID:KFINANCE

Base Currency:USD

Budgeted Cost

Find | View All

First1-3 of 4Last

Department	Demand	Budgeted	Cost	Projected/ Actual		Cost
		Duration		Demand	Duration	
10000	0	0.0	0.000	0	0.0	0.000
				0	0.0	0.000
11000	0	0.0	0.000	0	0.0	0.000
				0	0.0	0.000
13000	11	176.0	0.000	0	0.0	26456.000
				0	0.0	26456.000
	11	176.0	0.000	0	0.0	26456.000
				0	0.0	26456.000

Budgeted Cost page

Note. In the departmental view, to see all the budgeted training versus the current training information for all departments, you may need to scroll down the page.

See Also

Chapter 6, “Planning Training Budgets,” [Tracking Training Plans, page 103](#)

Chapter 3, “Setting Up Training Costs,” [Setting Up Default Training Costs, page 16](#)

Chapter 3, “Setting Up Training Costs,” [Setting Up Training Cost Currency, page 13](#)

Comparing Budgeted Costs to Actual Costs

Access the Summary Cost page.

Summary Cost				
Budget Period:	K1999CALYR	Business Unit:	GBIBU	Dept View ID: KFINANCE
Base Currency:	USD		Demand	Duration
				Cost
From Budget Training	Budgeted	11	176.0	0.000
	Projected	0	0.0	26456.000
	% Projected / Budgeted	0.00	0.00	0.00
	Actual	0	0.0	26456.000
	% Actual / Projected	0.00	0.00	100.00
	% Actual / Budgeted	0.00	0.00	0.00
From Administer Training	Projected	7	81.0	10480.000
	Actual	7	81.0	10480.000
	Total Actual	7	81.0	36936.000
	% Total Projected / Budgeted	63.64	46.02	0.00
	% Total Actual / Total Projec.	100.00	100.00	100.00
	% Total Actual / Budgeted	63.64	46.02	0.00

Summary Cost page

From Budget Training

These results include all the demands that you budgeted for in the Budget Training business process.

For all of your budgeted training costs for the specified budget period, business unit, and departments in the departmental view ID), the system provides demand, duration and cost information as follows:

Category	Demand	Duration	Cost
Budgeted	Budgeted total demand (number of employees to be trained).	Budgeted total training duration that you estimated as part of your training budget.	Total budgeted training cost.
Projected	Projected (current realized) training demand (number of employees that are enrolled or are in training).	Projected (current realized) duration for the training that has occurred to date.	Projected cost for the training to date. The projected amounts here include those students that have been enrolled in the course sessions for that budget period but have not yet completed the course (Attendance status is other than <i>Completed</i>).

Category	Demand	Duration	Cost
Percent of projected (realized) cost compared to budgeted cost	Projected (realized) demand compared to budgeted demand.	Projected (realized) duration compared to budgeted duration	Projected cost compared to budgeted cost. This represents the budget percentage you've projected that you will spend to date. Remember that you haven't actually spent this money yet, because it is only projected.
Actual training expenses incurred to date	Actual number of employees trained (demand).	Actual total training duration to date.	Actual cost to date.
Percentage of actual costs compared to projected costs	Actual number of employees trained compared to projected number of employees trained.	Actual duration amount compared to projected training duration amount.	Actual training cost compared to projected training cost. If the amount is 100 percent, then your projected budget amount equals the actual amount that you've spent. If the result is less than 100 percent, you still have projected budget money to spend. If the amount is more than 100 percent, then you've overspent your training budget.
Percentage of actual cost compared to budgeted cost	Actual (realized) demand compared to budgeted demand.	Actual (realized) duration compared to budgeted duration.	Actual (realized) cost compared to budgeted cost. This represents the percentage of your budget that you've spent to date.

From Administer Training

These amounts are for costs that were not included as part of your training budget for the budget period. This includes all training that was tracked in the Administer Training business process but not linked to a budget training demand, as follows:

Category	Demand	Duration	Cost
Projected	Projected (current realized) training demand (number of employees that are enrolled or are in training).	Projected (current realized) duration for the training that has occurred to date.	Projected cost for the training to date. The projected amounts here include those students that have been enrolled in the course sessions for that budget period, but have not yet completed the course (Attendance status is other than <i>Completed</i>).
Actual	Actual unbudgeted employees trained.	Actual unbudgeted training duration amount.	Actual cost associated with training unbudgeted employees. The actual population is made up of students that have completed the course sessions for that budget period (Attendance status is <i>Completed</i>).

Total Actual Costs

These amounts represent a summary of the actual costs, both as part of the training budget and from unbudgeted costs that are tracked in the Administer Training business process, as follows:

Category	Demand	Duration	Cost
Total actual	Total (current realized) training demand (number of employees currently trained or in training).	Total (current realized) duration for the training that has occurred to date.	Total cost for the training to date.
Percentage of total budgeted amount that the projected amount represents	Percentage of total budgeted demand the projected demand represents.	Percentage of total budgeted duration the projected duration represents.	Percentage of the total budgeted cost that the projected cost represents. The projected amounts here include students who have been enrolled in the course sessions for that budget period but have not yet completed the course (Attendance status is other than <i>Completed</i>).

Category	Demand	Duration	Cost
Percentage of the total actual amount represented by the total projected amount	Percentage of the total actual demand represented by the total projected demand.	Percentage of the total actual duration represented by the total projected duration	Percentage of the total actual cost represented by the total projected cost. The projected amounts here include those students that have been enrolled in the course sessions for that budget period but have not yet completed the course (Attendance status is other than <i>Completed</i>).
Percentage of total budgeted amount that the actual amount represents	Percentage of total budgeted demand that the actual demand represents.	Percentage of total budgeted duration that the actual duration represents.	Percentage of the total budgeted cost that the actual cost represents.

(FRA) Reviewing Employee Session Costs

If you're administering training programs for French workers, you can view a summary of course session cost information for the employee. This inquiry page displays information that is relevant to the French Training Report 2483 and includes information about financed training costs and chargeable amounts that aren't included on the Student Training Summary page.

Use this inquiry page only after you've run the FRA Compute 2483 process and reviewed or updated the employee's cost information on the Track Student Cost component.

See Also

[Chapter 12, "\(FRA\) Producing the French Training Report 2483," page 189](#)

Page Used to Review Employee Session Costs

Page Name	Object Name	Navigation	Usage
EE Session Cost Summary (employee session cost summary)	TRN_EE_SMR_COST1	Enterprise Learning, Cost Analysis, Review Costs, Student Ssn Cost Summary FRA, EE Session Cost Summary	View a summary of course session cost information for an employee. Note. This page is relevant to French organizations only.

Viewing Employee Course Session Costs

Access the EE Session Cost Summary page.

EE Session Cost Summary				
Jones,Rebekah		Employee		EmplID: K0G001
Course:	K012	Project Management	Session #:	0001
Start/End Date:	02/15/1999	02/23/1999		
Currency Code:	USD	Financed	Company	Chargeable
Provider:	251.84	0.00	251.84	0.00
Facility:	442.29	0.00	442.29	0.00
Empl Cost:	220.00	0.00	0.00	0.00
Instructor:	0.00	0.00	0.00	0.00
Expense:	0.00	0.00	0.00	0.00
Equipment:	23.61	0.00	23.61	0.00
Total:	937.74	0.00	717.74	0.00

EE Session Cost Summary page

For each cost that is categorized as a provider, facility, employee cost, instructor, expense, or equipment amount in the France group boxes on the Track Student Cost page, the system displays that cost for the session indicated.

For each charge, the system displays:

- The total amount that is associated with the training category.
- The total financed amount for the training category.
- The total company-contributed amount for the training category.
- The total chargeable amount for the training category. Company costs are calculated as follows: $\text{Company Costs} = \text{Total Costs} - \text{Financed Costs}$.

Note. The chargeable amount is based on charges for French workers that you indicated as chargeable on the cost pages in the Administer Training business process. Chargeable costs are also reflected in the company-contributed/financed amount, as indicated in the Course Session Cost table. You can indicate a cost as chargeable in the Course Session Cost French group boxes in Administer Training.

At the bottom of the page, the system displays the total cost for the course session for this student, the total financed amount, the total company-contributed amount, and the total chargeable amount.

See Also

[Chapter 12, “\(FRA\) Producing the French Training Report 2483,” page 189](#)

[Chapter 3, “Setting Up Training Costs,” Setting Up Training Cost Currency, page 13](#)

CHAPTER 11

(DEU) Tracking Professional Educational Programs for German Employees

This chapter provides an overview of German internal educational training programs and discusses how to identify steps, group steps, and track employee progress.

Understanding German Internal Educational Training Programs

Companies in Germany can have their employees follow company-provided professional educational training programs. Companies that offer these programs, called German internal education training programs, can track the steps and status of employees as they work toward their degrees.

To set up and monitor a German internal education training program:

1. Identify the steps that make up the education plan.
2. Group the steps to create a training plan.
3. Enter information about the employee or track the employee's progress.

Identifying Steps, Grouping Steps, and Tracking Employee Progress

This section discusses how to:

- Identify the steps in a training program.
- Group the steps into a training plan.
- Track employee progress.

Pages Used to Identify Steps, Group Steps, and Track Employee Progress

Page Name	Object Name	Navigation	Usage
Ipe Step Table (internal professional education step table)	IPE_STEP_TABLE	Set Up HRMS, Product Related, Enterprise Learning, Steps DEU, Ipe Step Table	Identify the steps that make up an educational training program.
Ipe Plan Table	IPE_PLAN_TABLE	Set Up HRMS, Product Related, Enterprise Learning, Plans DEU, Ipe Plan Table	Group the steps into a training plan.
Internal Profes. Education (internal professional education)	EE_IPE_PLAN	Enterprise Learning, Result Tracking, Internal Education DEU, Internal Profes. Education	Track the progress of German employees who are participating in the training plan.
Int. Prof Education Status (internal professional education status)	PRCSRUNCNTL	Enterprise Learning, Training Reports, Int Prof Education Status	This report (PER107GR) details the current status of employees who are enrolled in an internal education training plan. Includes only employees who selected the Intern check box and didn't select <i>Graduated</i> on the Professional Education page. This is a Crystal report.

Identifying the Steps for a Training Plan

Access the Ipe Step Table page.

Ipe Step Table

Step ID: YM

***Description:**

Short Description:

Duration Time:

☐ Theoretical
 ☒ Practical

Comment:

Ipe Step Table page

Duration Time

Enter or update the numeric duration time of the step and select the type of measurement: *Days, Hours, Months, Weeks, or (none)*.

The duration time that you enter isn't related to your Budget Training duration units. These pages don't affect training cost calculations in Budget Training or Administer Training.

Theoretical/Practical

These categories are used by German organizations for training reporting purposes.

Grouping the Steps into a Training Plan

Access the Ipe Plan Table page.

Ipe Plan Table

Step ID

Add or delete the steps that make up this plan. When you add a step, the system displays information about the step.

Tracking Employee Progress

Access the Internal Profes. Education page.

Internal Profes. Education page:

Use this page to record additional educational information for German employees.

You can also track an employee's progress by printing the German Internal Professional Education Status report.

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

Common Page Information

Degree	Displays the degree that applies to this training plan.
Date Acquired	Enter the date that the employee acquired the degree.
Plan ID	When you move out of this field, the system displays the plan description and populates the Plan Step table on the page with any step IDs that are associated with this plan.
Step	Displays the step IDs that are associated with the plan that you selected in the Plan ID field. You can update the step ID, business unit, and department default values for the plan ID on this page. You can also add step IDs that are not associated with the plan ID, to reflect any variations in the employee's training plan.

Status Tab

From Date and Thru Date (through date)	Enter when the employee starts and finishes the step.
--	---

CHAPTER 12

(FRA) Producing the French Training Report 2483

This chapter provides an overview of the French Training Report 2483 process and discusses how to:

- Review the setup for groups and indicators.
- Enter additional report parameters.
- Run the report process and review results.
- Run the report.

Understanding the French Training Report 2483 Process

This section lists common elements and discusses the French Training Report 2483.

Common Elements Used in This Chapter

Description	In the second Description field, enter comments that provide additional information about the group or indicator. These comments won't affect your training reporting.
Number of Columns	Review the number of columns for the group or indicator. The number of columns that you specify affects the number of columns that the system displays for the group or indicator. If you change the number of columns and move out of this field, the Number of Columns description fields (for example, Descr. 1) change automatically.

French Training Report 2483

The Training Report 2483 (TRN029), also called the Declaration 2483 Report, is a French regulatory report that is used to declare the vocational training that your company has provided to your employees. This report compiles information about the amount of money that your company spends on training.

The report provides details for ten groups of information that are defined by the French government. PeopleSoft delivers the groups as system data in PeopleSoft Human Resources.

Note. Any changes that you make to these groups directly affect the way that the system generates your French Training Report 2483. Therefore, you should make changes only in response to changes in the French regulatory reporting requirements.

You use PeopleSoft Application Engine in your PeopleSoft Human Resources system to calculate and compile the information for the training report.

Here is an overview of how to prepare your Training Report 2483:

1. Set up training report groups.
2. Set up training report indicators.
3. Enter training report parameters.
4. Run the Compute Training Report 2483 (DEC2483) process calculation for all indicators.
5. (Optional) Review and edit the results of the process calculations.
6. Run the Training Report 2483 (TRN029) to print (or export to a file) the results of the process calculations.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Meet Regulatory Requirements, “(FRA) Meeting Regulatory Requirements for France”

PeopleTools PeopleBook: PeopleSoft Application Engine

Reviewing Setups for Groups and Indicators

This section discusses how to:

- Review the group setup.
- Review the indicator setup.

Pages Used to Review Training Report Groups and Indicators

Page Name	Object Name	Navigation	Usage
2483 Table - 2483 Group	GROUP_2483_TBL_FRA	Set Up HRMS, Product Related, Enterprise Learning, 2483 Table FRA, 2483 Group	Review the group setup for your French Training Report 2483.
2483 Table - 2483 Indicator	INDIC_2483_TBL_FRA	Set Up HRMS, Product Related, Enterprise Learning, 2483 Table FRA, 2483 Indicator	Review the indicator setup for your French Training Report 2483 groups.

Reviewing the Group Setup

Access the 2483 Table - 2483 Group page.

The 2483 report provides information on 10 sections/groups that are designed by letters from B to M (for example, B is for “General Information” and C is for “Costs Summary.”)

2483 Group		2483 Indicator	
2483 Group:	F		
*Description:	Company Cost		
Short Description:	CompanyCst		
Description:			
*Number of Columns:	1		
Descr. 1	Cost		

2483 Table - 2483 Group page

The following groups (used in the 2483 Group field) are delivered with PeopleSoft Human Resources:

Group ID	Description
B	General Information
C	Costs Summary
E	Training Levy Credit
F	Company Cost
G	Financing Sandwich Course
H	Finance Training Leave
J	Finance Training Leave Limited
L	Distribution by Category
M	Distribution by Gender and Age

When you enter a new indicator for a group, the number of columns and the descriptions on this page are used as default values on the FRA 2483 Table - 2483 Indicator page.

Reviewing the Indicator Setup

Access the 2483 Table - 2483 Indicator page.

An indicator is an elementary information which composes a group. The indicator is defined, reviewed, and updated by the user.

2483 Table - 2483 Indicator page

The system displays the 2483 group that is associated with the indicators on this page.

PeopleSoft provides the appropriate labels for each column. The report prints Descr 1, Descr 2, and so forth as the indicator labels on the French Training Report.

Entering Additional Report Parameters

The 2483 report requires additional parameters that are not stored in PeopleSoft Human Resources. Before you run the report, you must enter these parameters into the system.

Page Used to Enter Additional Report Parameters

Page Name	Object Name	Navigation	Usage
Trn 2483 Parameters Setup (training 2483 parameters setup)	TRN_2483_PARM	Set Up HRMS, Product Related, Enterprise Learning, 2483 Indicators FRA, Trn 2483 Parameters Setup	Enter additional parameters that are required for your 2483 report.

Entering Additional Parameters

Access the Trn 2483 Parameters Setup page.

Trn 2483 Parameters Setup	
Company: AA	
2483 Report Parameters Find View All First 1 of 1 Last	
*Effective Date: 11/06/2002	Group C
Reduction Rate (10 Emp. Mark):	Indicator 8:
	Indicator 12:
Group F	Group G
Indicator 1:	Reduction Rate:
Reduction Rate:	Indicator 11:
	Indicator 12:
Group H	Group J
Reduction Rate:	Indicator 20:
Indicator 17:	Indicator 22:
Indicator 18:	
Group K	
Indicator 25:	Indicator 26:

Trn 2483 Parameters Setup page

Reduction Rate (10 Emp. Mark) (reduction rate [10 employee mark])

If your organization is entitled to a reduction based on the number of employees who have been employed over the previous 7 years, enter the percentage.

Group C

Indicator 8

Enter the amount that is paid to a registered body for training.

Indicator 12

Enter the amount of other payments that are related to training.

Group F

Indicator 1

Enter the total of the annual salaries for your organization.

Reduction Rate

The total annual salaries and the type of organization determine the amount that an organization must spend on vocational training. Enter the multiplier (1, 5, or 2) that applies to your organization.

Group G

Reduction Rate

The amount that your organization must spend on sandwich training depends on whether your organization is liable for the tax known as *La Taxe d'apprentissage*. Enter the multiplier, 0.3 percent or 0.4 percent, that applies to your organization.

Indicator 11

Enter the amount that is paid to a registered body for sandwich training courses.

Indicator 12

Enter the amount that is paid directly by the organization for sandwich courses.

Group H

Reduction Rate The amount that an organization must spend on financing training leave depends on the type of organization. Enter the multiplier, *0.2* percent or *0.3* percent, that applies to your organization.

Indicator 17 Enter the amount that is paid to a registered body for the Capital Temps Formation. In this scheme, employer payments are converted to the number of hours of training that an employee is entitled to take.

Indicator 18 Enter the amount that is paid to a registered body for training leave.

Group J

Indicator 20 Enter the total salaries for your limited contract employees.

Indicator 22 Enter the amount that is paid to a registered body for training leave for limited contract employees.

Group K

Indicator 25 If your organization hasn't spent the required amount on training, you must make a regularization payment to the French authorities. Enter the amount of the payment.

Indicator 26 If your organization is liable for an adjustment payment for failing to consult the Company Work Council, enter the amount of the adjustment.

Running the Report Process and Reviewing Results

This section discusses how to:

- Run the Compute Training Report (DEC2483) process.
- Review and edit process results.

Pages Used to Run the Report Process and Review Results

Page Name	Object Name	Navigation	Usage
Compute 2483 FRA - Declaration 2483	RUNCTL_DEC2483	Enterprise Learning, Training Reports, Compute 2483 FRA, Declaration 2483	Run the Compute Training Report 2483 process.
Edit 2483 Edit - Edit 2483	EDIT_2483_FRA	Enterprise Learning, Training Reports, Edit 2483 FRA	Review and edit the results of the calculations that are run by the Compute Training Report process on each of your indicators.

Running the Compute Training Report Process

Access the Compute 2483 FRA - Declaration 2483 page.

Declaration 2483

Run Control ID: GN4 [Report Manager](#) [Process Monitor](#) **Run**

Report Request Parameters:

Company:

Calendar Year: Creation Date: 11/06/2002

Compute 2483 FRA - Declaration 2483 page

Run this process once you have entered all the training report group and indicator information.

Company Select the company that is to run the French Training Report 2483.

Calendar Year Enter the calendar year that the system is to use to determine cost information for that report.

See Also

PeopleTools PeopleBook: PeopleSoft Application Engine

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Reviewing and Editing Process Results

Access the Edit 2483 FRA - Edit 2483 page.

Edit 2483

Run Control ID: YM
[Report Manager](#)
[Process Monitor](#)
Run

2483 Group
Find | View All
First 1 of 10 Last

2483 Group: B General Information
Creation Date: 11/04/2002
+ -

2483 Indicator
Find | View All
First 1-3 of 7 Last

2483 Indicator: 02 Male
+ -

NonQualWrk	QualWrk	OfficeWrk	Manager	Executive	Total
1.000	5.000	8.000	7.000	3.000	24.000

2483 Indicator: 03 Female
+ -

NonQualWrk	QualWrk	OfficeWrk	Manager	Executive	Total
1.000	1.000	6.000	7.000	3.000	18.000

2483 Indicator: 04 Male + Female
+ -

NonQualWrk	QualWrk	OfficeWrk	Manager	Executive	Total
2.000	6.000	14.000	14.000	6.000	42.000

Edit 2483 FRA - Edit 2483 page

You can edit any amount on this page.

Some indicators cannot be calculated. For those indicators, compile the information manually and use this page to enter it into the system.

Note. If you rerun the Declaration 2483 process after making edits to the amounts on this page, the system overwrites the edits that you made to the Declaration 2483 results prior to rerunning the Declaration 2483 process.

See Also

[Chapter 12, “\(FRA\) Producing the French Training Report 2483,” Entering Additional Report Parameters, page 192](#)

Running the Report

When you are satisfied with the results of the Compute Training Report process, run the actual report on the Report Training 2483 page. The indicators that are required by the French government are calculated by PeopleSoft Human Resources and tabulated in this Crystal report.

Page Used to Run the Report

Page Name	Object Name	Navigation	Usage
Report Training 2483	RUNCTL_TRN029	Enterprise Learning, Training Report, 2483 Tax Declaration FRA, Report Training 2483	Compiles results of calculation of the 2483 indicators for declaring vocational training of employees in French organizations. Before running this report, run the Compute Training Report 2483 (DEC2483) process to calculate the indicators. Check the calculation results and do any updating on the FRA Edit 2483 - Edit 2483 page.

CHAPTER 13

(MEX) Running Mexican Training Reports

This chapter provides an overview of Mexican training requirements and discusses how to run Mexican training reports.

Understanding Mexican Training Requirements

As a company operating in Mexico, you are required to create training and development plans for your employees. The plan consists of identifying courses and events that meet the training and development needs of the workforce. Each course or event should have a detailed description of the objective and activities. Training can be internal or external.

In Mexican companies, a mixed committee is formed to oversee the training and development process for employees. The mixed committee is made up of an equal number of employee and employer representatives and is selected annually. You define details for the mixed committee on the Mixed Committee page.

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

Depending on the type of training, there are specific legal forms to fill out. With PeopleSoft Human Resources Administer Training, you can generate reports to comply with the legal forms required by the government. This chapter discusses the various statutory reports.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, “Creating and Tracking Incidents”

Common Elements Used in This Chapter

Mixed Committee	When entering information for training reports, the Mixed Committee you select must be of a Training type.
Contract Type	Specify the contract type by selecting <i>Individual</i> , <i>Collective</i> , or <i>Law</i> .
Plan Type	Select the type of Training Program or Course that you want to generate the report for.

Running Mexican Training Reports

This section discusses how to:

- Run the DC-2 reports.
- Run the DC-5 reports.

Pages Used to Run Mexican Training Reports

Page Name	Object Name	Navigation	Usage
DC-1 Format	RUNCTL_STP001	Enterprise Learning, Training Reports, STPS DC-1 Format MEX, DC-1 Format	The MXSTPP001 (format) and MXS TP—2 (reverse) reports provide details about the formation of a training mixed committee and the establishment associated with the mixed committee.
DC-2 Format	RUNCTL_STP003	Enterprise Learning, Training Reports, STPS DC-2 Format MEX, DC-2 Format	The MXSTP003 (format) and MXSTP004 (reverse) reports provide training and development plan information, including training objective priorities, as well as the establishment associated with the mixed committee.
DC 2-B Format	RUNCTL_STP005	Enterprise Learning, Training Reports, STPS DC 2-B Format MEX, DC 2-B Format	Run the (MEX) DC 2-B Training and Development Registration Application report (MXSTP005).
DC-3 Format	RUNCTL_STP006	Enterprise Learning, Training Reports, STPS DC-3 Format MEX, DC-3 Format	Create a Courses/Events Certificate.
DC-4 Format	RUNCTL_STP007	Enterprise Learning, Training Reports, STPS DC-4 Format MEX, DC-4 Format	Creates a Courses/Events Certificates list.
DC-5 Format	RUNCTL_STP008	Enterprise Learning, Training Reports, STPS DC-5 Format MEX, DC-5 Format	Runs the Training and Development External Registration Application MXSTP008 (format) and MXSTP009 (reverse) reports. • (MEX) DC-5 Training and Development External Registration Application report (MXSTP008). • (MEX) DC-5 Training and Development External Registration Application (Reverse) report (MXSTP009).

Running the DC-1 Reports

Access the DC-1 Format page.

DC-1 Format

Run Control ID: GN4
[Report Manager](#)
[Process Monitor](#)
[Run](#)

Report Request Parameters

*Company:

*Establishment ID:

Mixed Committee:

Contract Type

☐ Individual
☐ Collective
☒ Law

DC-1 Format page

Running the DC-2 Reports

Access the DC-2 Format page.

DC-2 Format

Run Control ID: GN4
[Report Manager](#)
[Process Monitor](#)
[Run](#)

Report Request Parameters

*Company:

*Establishment ID:

Mixed Committee:

Contract Date:

Plan Phases:

Begin Date:

End Date:

☒ Print Address

Contract Type

☐ Individual
☐ Collective
☒ Law

Modality

☐ Specific Company PlansProg.
☐ Common Company PlansProg
☐ Gen. System Branch (Econ Act.)

DC-2 Format page (1 of 2)

Training Plan Obj. Priority	
1	
2	
3	
4	
5	

DC-2 Format page (2 of 2)

Contract Date

Enter the collective contract signature date or the collective contract revision date.

Plan Phases

Define the number of phases in which you are going to run your training program plan.

Training Plan Obj. Priority
(training plan objective priority)

Values are *Increase Productivity*, *Prepare to Occupy New Vac/Pos*, *Prevent Work Risks*, *Provide New Technologies Info*, and *Upg/Improve Knowledge & Comp*.

Running the (MEX) DC 2-B Training and Development Registration Application Report

Access the DC 2-B Format page.

Training Program

Select the type of training program.

Running the (MEX) DC-3 Courses/Events Certificates Report

Access the DC-3 Format page.

DC-3 Format

Run Control ID: GN4 [Report Manager](#) [Process Monitor](#) [Run](#)

*Company:

*Establishment ID:

Employee Representative Name:

Selection Criteria

From Employee / To:

Plan Type

☒ Training Program Instructor ID:

☐ Course

	Course Code	Description	Session #	Start Date	End Date		
1							

Customize | Find | View All | First 1 of 1 Last

DC-3 Format page

- Employee Representative Name** Enter the name of the employee representative who is on the Mixed Committee.
- From Employee/To** Enter the range of employee numbers for whom this training is being provided.
- Plan Type** Select the training plan type. You can select either Training Program or Course. If you select Training Program, you also need to enter the Instructor ID.
- Course Code** Select the course code. The course description displays next to the course code.
- Session #** Select the session number for the course being taught.
- Start Date, End Date** Once you have entered the course code and session number, the system displays the start and end date for the next available course.

Running the (MEX) DC-4 Courses/Events Certificates List Report

Access the DC-4 Format page.

DC-4 Format

Run Control ID: GN4
[Report Manager](#)
[Process Monitor](#)

Run

Report Request Parameters

*Company:

*Establishment ID:

Begin Date:

End Date:

DC-4 Format page

Running the DC-5 Reports

Access the DC-5 Format page.

DC-5 Format

Run Control ID: GN4
[Report Manager](#)
[Process Monitor](#)

Run

Report Request Parameters

*Company:

*Establishment ID:

Application Type:

☒ Print Instructors

Plan Type

☒ Training Program

☐ Course

Customize | Find | View All |

First 1 of 1 Last

	Course Code	Description	Session #	Start Date	End Date		
1						+	-

DC-5 Format page

Application Type

Values are *Initial*, *Instructor Change*, *New Programs*, and *Update Courses*.

Print Instructors

Select to include instructor names on the report.

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provides users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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