PeopleSoft®

PeopleSoft 8.8 Human Resources PeopleBook: Administer Company Cars

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PeopleSoft 8.8
Human Resources PeopleBook:
Administer Company Cars
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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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Contents

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.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

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.
Italics	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 0, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
`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 *See.* 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 Company Cars 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 Company Cars* 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 Company Cars

This chapter provides an overview of PeopleSoft Human Resources Administer Company Cars business process and discusses:

- Administer Company Cars business processes.
- Administer Company Cars implementation.

Administer Company Cars Business Processes

PeopleSoft Human Resources Administer Company Cars business processes are:

- Set up PeopleSoft Human Resources Administer Company Cars.
- Administer company cars for your workforce.
- (GBR) Define tax percentages and engine types.

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

Administer Company Cars Implementation

The Administer Company Cars table-loading implementation includes the following:

- Set up PeopleSoft HRMS fundamental tables.
- Set up core Administer Company Cars tables.
- (GBR) Set up additional Administer Company Cars tables.

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

Important! The order in which you set up the tables required to implement Administer Company Cars may vary; each individual application isn't necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the Administer Company Cars core application, then several tables that are specific to the country or industry in which you operate, followed by other Administer Company Cars core application tables. In addition, the order in which you set up tables may also depend on the features that you want to use.

Setting Up PeopleSoft HRMS Fundamental Tables

The Administer Company Cars business process requires that you set up the fundamental HRMS tables common to multiple HRMS applications. The information that you define in these tables lays the foundation for the Administer Company Cars business process setup.

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

Setting Up Core Administer Company Cars Tables

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

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

- Administer vehicle fleets.
- Administer vehicle benefits programs.
- Define company property.

Step	Reference
1. Create company car benefits plans.	*PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits*, “Building Base Benefit Programs,” Building Benefit Programs With the Benefit Program Table Components
2. Define company car benefits plans.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Company Cars,” Setting Up the Company Car Benefit, page 9
3. Define car models.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Company Cars,” Setting Up Company Car Fleet Information, page 12
4. Define car maintenance, leasing and management locations.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Company Cars,” Setting Up Company Car Fleet Information, page 12
5. Define car details including allocation and maintenance details.	Chapter 3, “Setting Up PeopleSoft Human Resources Administer Company Cars,” Setting Up Company Car Fleet Information, page 12

(GBR) Setting Up Additional Administer Company Cars Tables

These steps define information in additional Administer Company Cars tables, specifically for the U.K. (United Kingdom). The information that you define in the core tables lays the foundation for this Administer Company Cars-specific setup.

Setting up these additional tables prepares the system to support emissions and tax reporting for the U.K.

Step	Reference
1. Define emissions data for tax reporting for the U.K.	Chapter 5, "(GBR) Defining Tax Percentages and Engine Types," Defining Tax Percentages and Engine Types, page 29
2. Define engine types and associated tax discounts for the U.K.	Chapter 5, "(GBR) Defining Tax Percentages and Engine Types," Defining Tax Percentages and Engine Types, page 29

CHAPTER 2

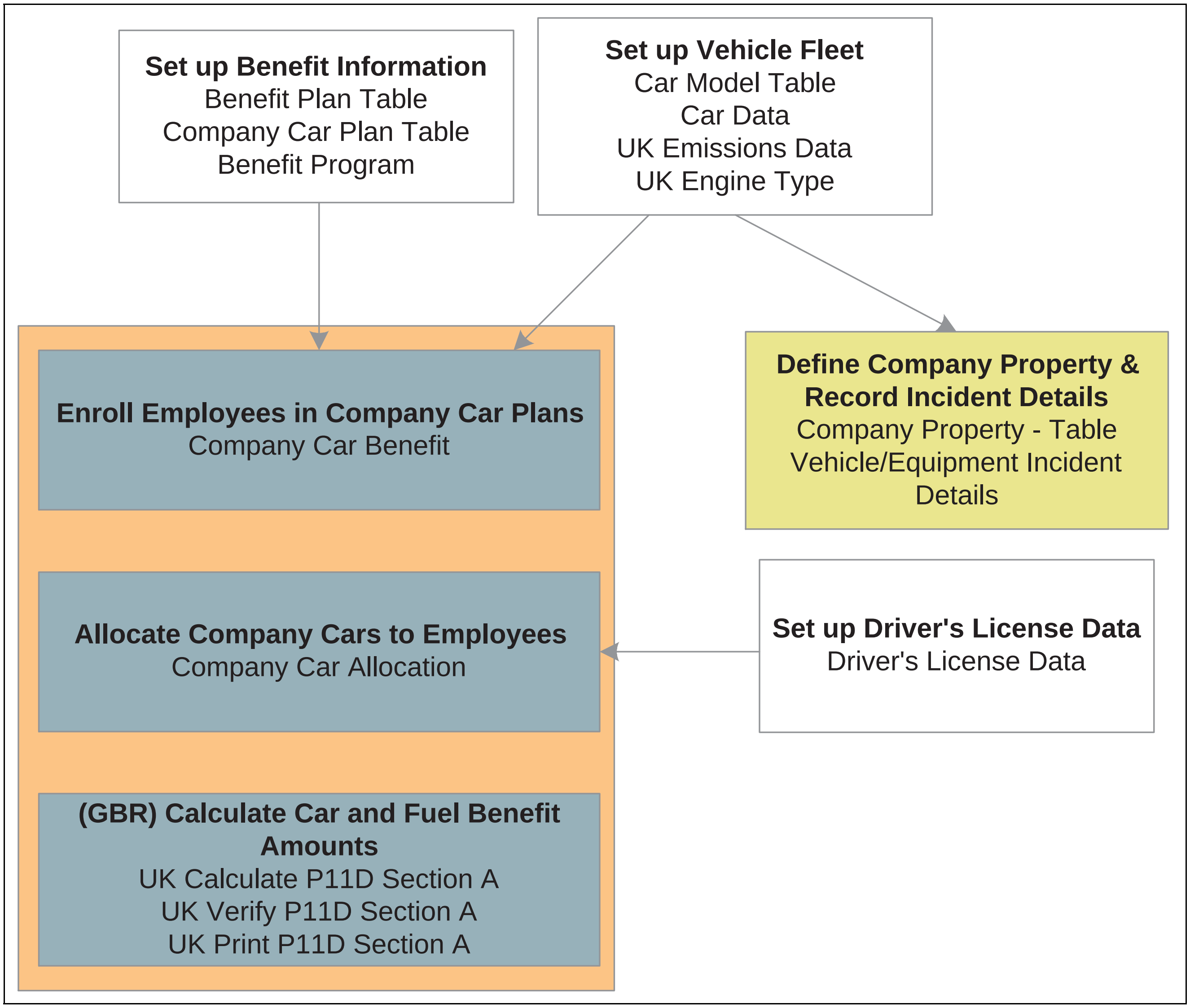
Understanding PeopleSoft Human Resources Administer Company Cars

This chapter provides an overview of the PeopleSoft Human Resources Administer Company Cars business process and discusses:

- Administer Company Cars business processes.
- Administer Company Cars business process integrations.

Administer Company Cars Business Processes

PeopleSoft Human Resources Administer Company Cars enables you to set up your company car benefits architecture and manually enroll employees into this benefit. The following process flow illustrates the Administer Company Cars business processes:



Administer Company Cars business process

PeopleSoft Human Resources Administer Company Cars supports the following business processes:

- Enroll employees in company car benefit .

  Enroll employees in the plan following a two-step process. First, enroll the participants in a benefit program. Then, enroll the participants in the company car benefit program on the appropriate pages.

- Allocate cars.

  Allocate the cars to employees who are already enrolled in the benefit plan.

- Track company cars and vehicle incidents.

  Define the cars as company property, so that you can track them using the PeopleSoft Human Resources Monitor Health and Safety.

- Define emissions and engine type data for the U.K.

  Administer Company Cars enables you to enter the emissions data to determine the tax percentages and the engine types and associated discounts for the U.K.

Administer Company Cars Business Process Integrations

Administer Company Cars business process integrates with all of the 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 Human Resources tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

We discuss integration considerations in this PeopleBook.

See Also

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

CHAPTER 3

Setting Up PeopleSoft Human Resources Administer Company Cars

This chapter discusses how to:

- Set up the company car benefit.
- Set up company car fleet information.

Setting Up the Company Car Benefit

This section discusses how to:

- Create and name the company car benefit.
- Enter company car benefit information.
- Add the company car benefit to benefit programs.

PeopleSoft considers a company car a benefit; therefore, some of the standard benefit plan codes and tables define the company car benefit.

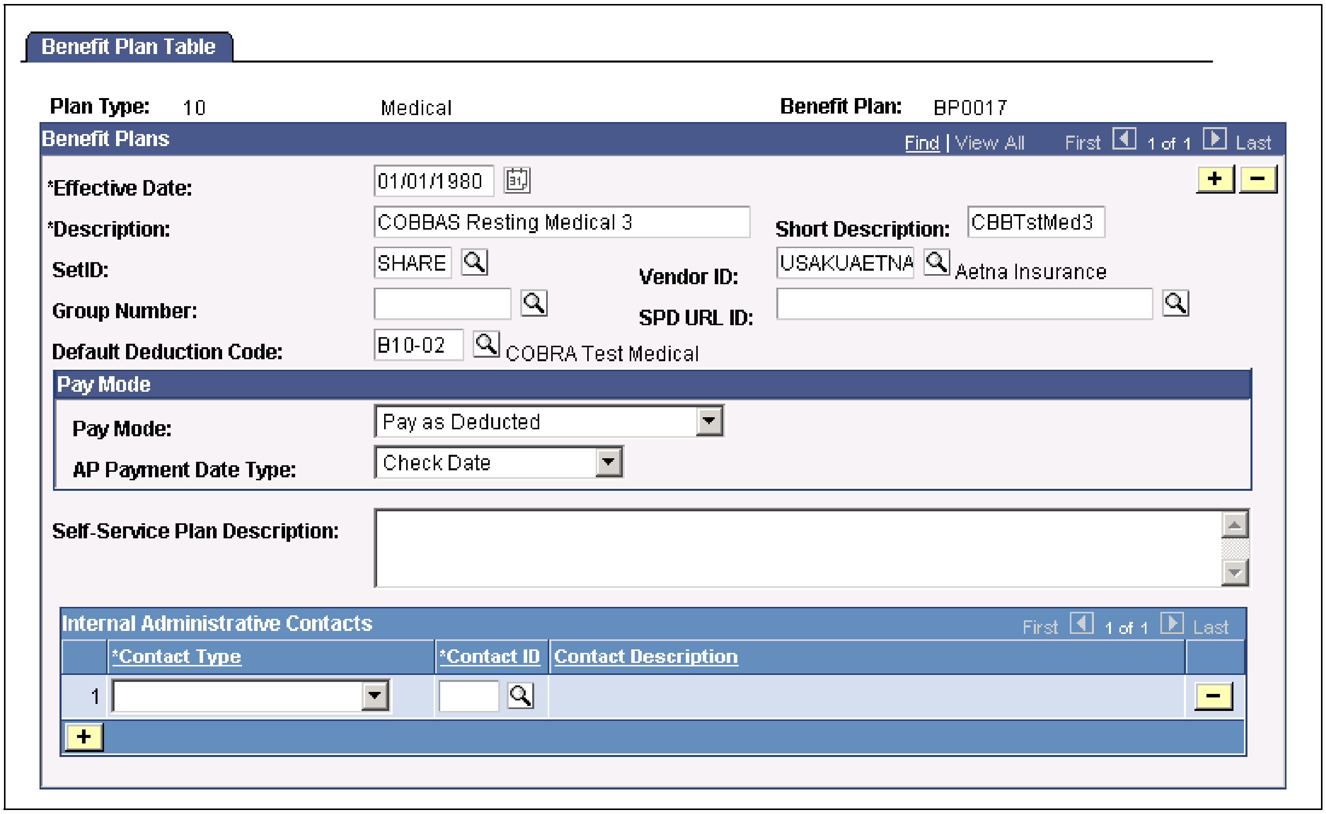
Note. Use the Benefit Plan Table to set up all types of benefits, not just company cars.

Pages Used to Set Up the Company Car Benefit

Page Name	Object Name	Navigation	Usage
Benefit Plan Table	BENEFIT_PLAN_TABLE	Set Up HRMS, Product Related, Workforce Administration, Company Cars, Benefit Plan Table	Create and name company car benefit plans.
Company Car Plan Table	CAR_PLAN_TABLE	Set Up HRMS, Product Related, Workforce Administration, Company Cars, Company Car Plan Table	Enter company car benefit information that is specific to each company car benefit plan.

Creating and Naming the Company Car Benefit

Access the Benefit Plan Table page.



Benefit Plan Table page

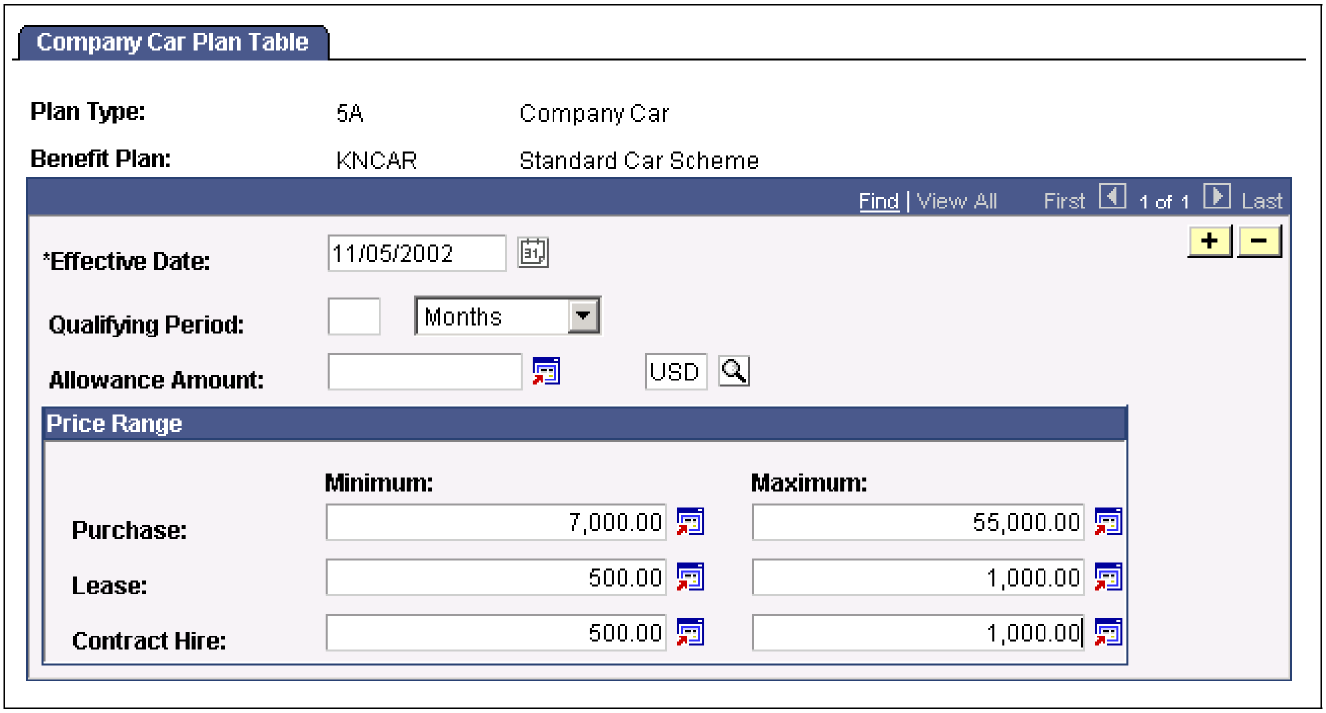
Plan Type and **Benefit Plan** The system displays the plan type and benefit plan that you entered. Leave the remaining fields blank.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits

Entering Company Car Benefit Information

Access the Company Car Plan Table page.



Company Car Plan Table page

Qualifying Period Enter the waiting or qualifying period for participating in this plan, if applicable. Select a unit by which to measure time and enter the number of those units.

Allowance Amount If you offer an allowance amount instead of a car, enter the amount and the currency code for that amount. This currency code applies to all fields on this page. Define the default allowance amount in the Installation table.

Price Range Use the fields in this group box to define the price range of a car. For example, an employee enrolled in the KGCAR benefit plan could have a car with a minimum list price of *7,000* and a maximum price of *55,000*.

Purchase List minimum and maximum amount of purchase. Specify the currency of these amounts by entering a currency code next to Allowance Amount. This code controls all amount fields on this page.

Lease and **Contract Hire** List minimum and maximum amount of lease or contract hire. Specify the currency of these amounts by entering a currency code to the right of Allowance Amount. This code controls all amount fields on this page

Adding the Company Car Benefit to Benefit Programs

To allow employees to use the car benefit plan, assign the plan to benefit programs and then assign benefit programs to employees.

To add the company car benefit plan to one of your organization’s Benefit/Deduction Programs, use the Benefit/Deduction Program Table pages that you find under Set Up HRMS, Product Related, Workforce Administration, Company Cars, Ben/Ded Program Tbl. Use these same pages when you define Benefit/Deduction Programs in the Benefit Program Table in the Base Benefits menu.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Base Benefits, "Building Base Benefit Programs," Building Benefit Programs With the Benefit Program Table Components

Setting Up Company Car Fleet Information

This section lists common elements and discusses how to:

- Track company cars.
- Enter location information.
- Enter a car profile.
- Record allocation information and track car pooling information.
- Record maintenance history.

Setting up car fleet information involves entering information about the cars, car models, car pool information, and vehicle maintenance. This information enables you to administer the allocation and tracking of company cars.

Common Element Used in This Section

Car ID Display an identification code for a specific vehicle.

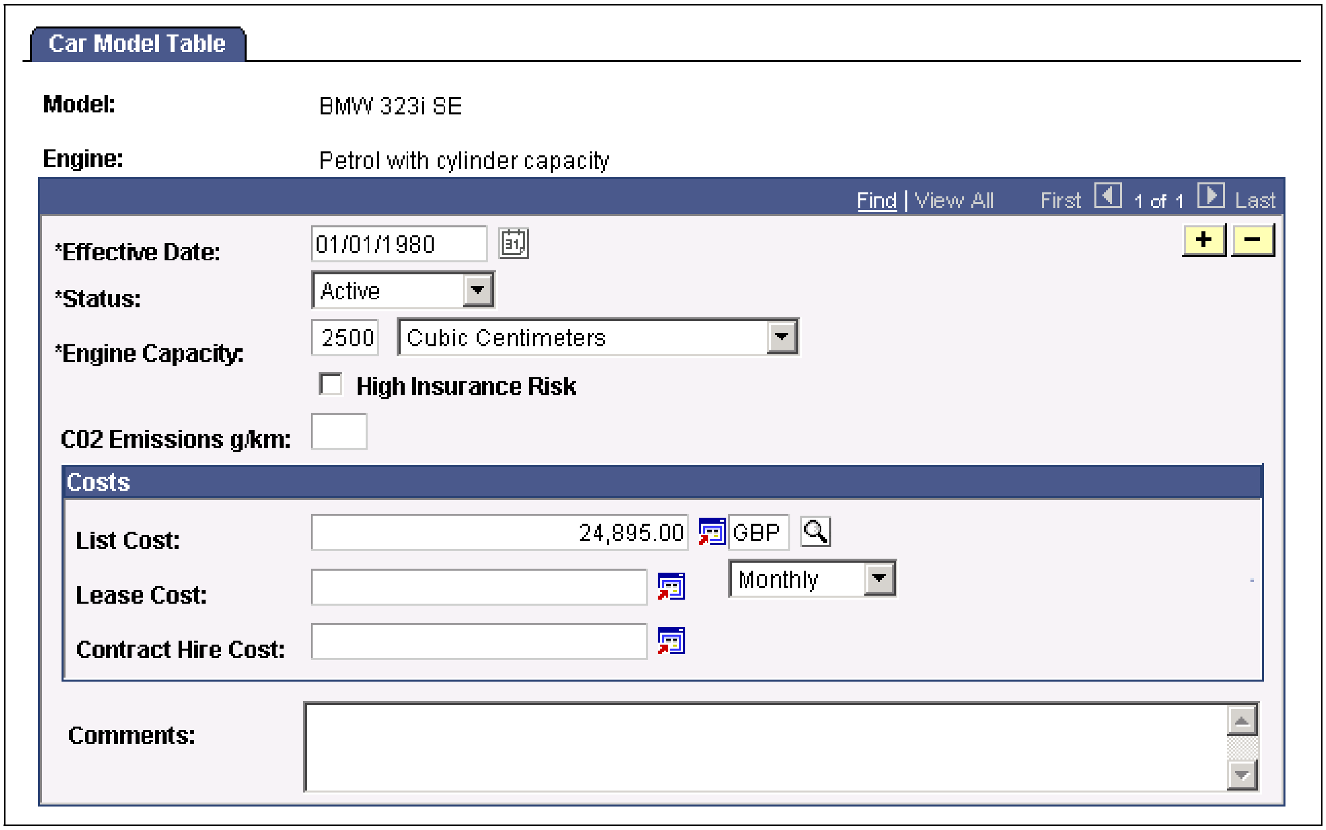
Note. To prevent numbering errors, always assign a number or let the system assign one automatically.

Pages Used to Set Up Company Car Fleet Information

Page Name	Object Name	Navigation	Usage
Car Model Table	CAR_MODEL	Set Up HRMS, Product Related, Workforce Administration, Company Cars, Car Model Table	Track company cars.
Car Management Location	CAR_MG_LOC_TBL	Set Up HRMS, Product Related, Workforce Administration, Company Cars, Car Management Location	Enter location information detailing where car maintenance, leasing, and management occurs.
Car Profile	CAR_DATA1	Set Up HRMS, Product Related, Workforce Administration, Company Cars, Car Data, Car Profile	Enter details such as a profile of the car and maintenance information.
Allocation	CAR_DATA2	Set Up HRMS, Product Related, Workforce Administration, Company Cars, Car Data, Allocation	Displays allocation information, track car pooling information, and enter comments about the car.
Maintenance	CAR_MAINT	Set Up HRMS, Product Related, Workforce Administration, Company Cars, Car Data, Maintenance	Record a company car’s maintenance history.

Tracking Company Cars

Access the Car Model Table page.

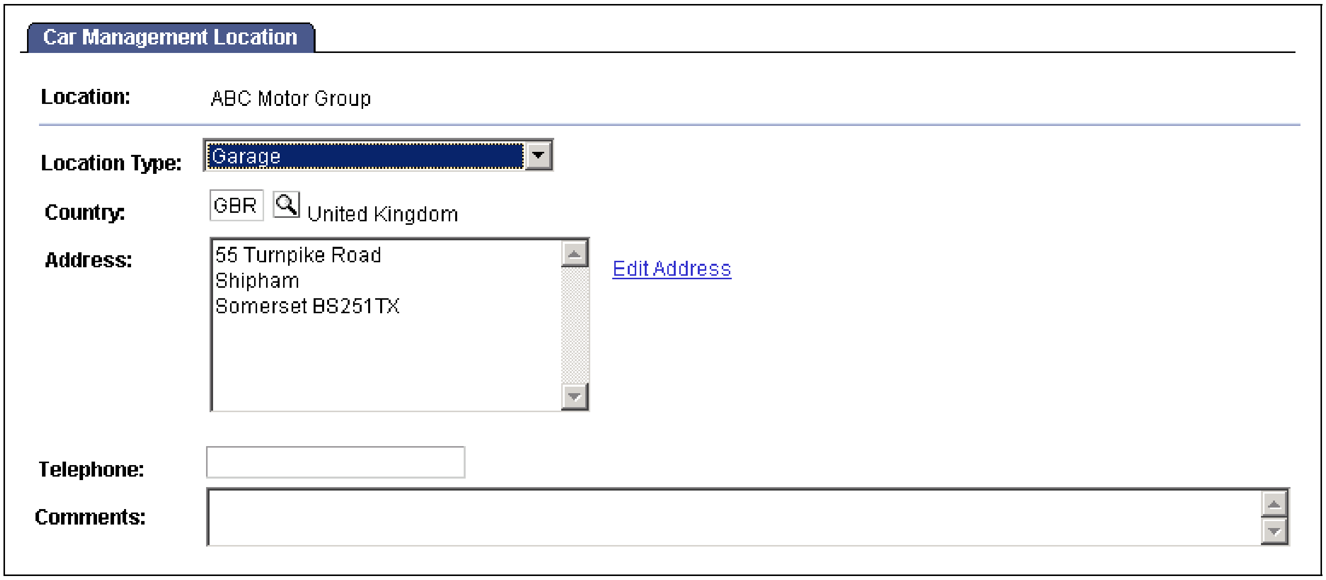


Car Model Table page

Model	Displays the manufacturer and model of the car.
Engine	Displays the engine type.
Engine Capacity	Enter the engine capacity for the model.
High Insurance Risk	Select this check box if this is a high-insurance car.
CO2 Emissions g/km (carbon dioxide emissions in grams per kilometer)	In the U.K., vehicle tax is based on carbon dioxide emissions. Enter the grams per kilometer emissions provided by the manufacturer in accordance with government guidelines.
List Cost	This is a required field that the system uses for tax purposes when performing P11D calculations. The currency code field next to the List Cost applies to all amount fields on the page.
Lease Cost and **Contract Hire Cost**	For lease and contract hire costs, select *Daily, Weekly, Monthly,* or *Yearly.*

Entering Location Information

Access the Car Management Location page.



Car Management Location page

Location Type

Values include:

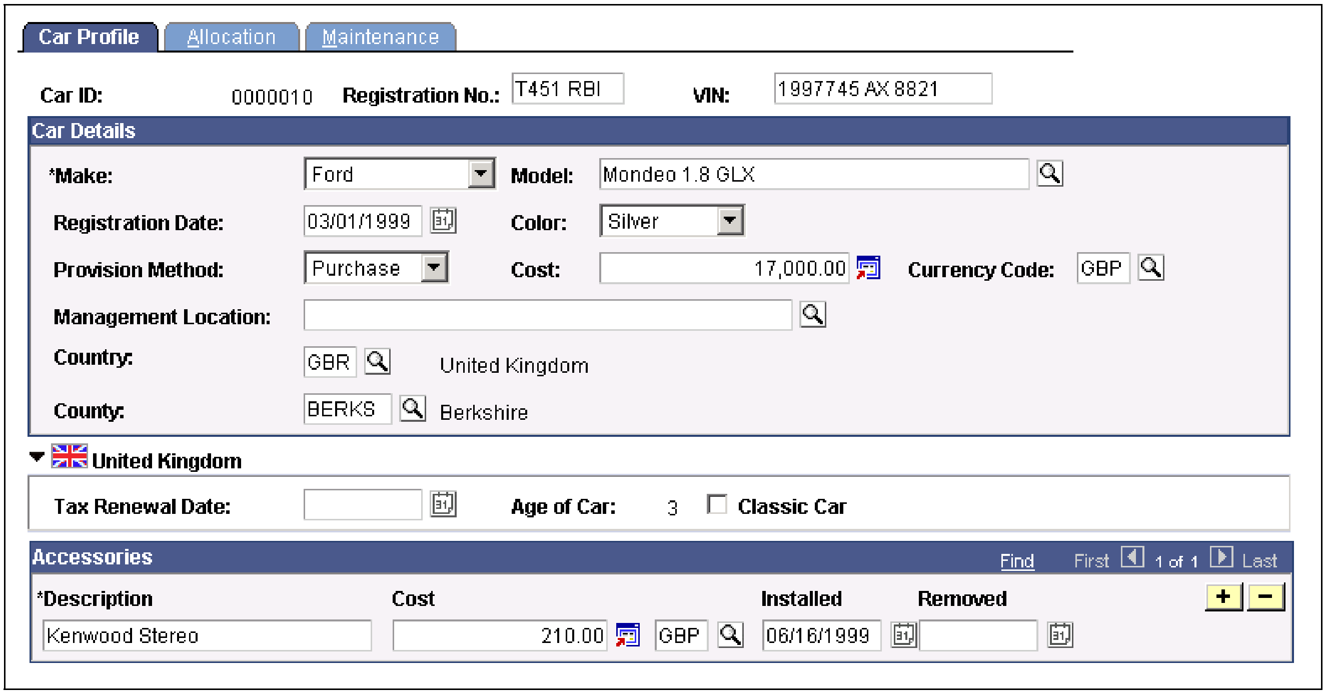
Garage: Select for a car maintenance facility.

Internal Management Center: Select for a location within your company that manages a car.

Lease Company: Select for a company from which you lease cars for use in your program.

Entering a Car Profile

Access the Car Profile page.



Car Profile page

Registration No. (registration number) and **VIN** (vehicle identification number) — Enter the vehicle's registration number and VIN.

Make and **Model** — These are required fields. Define values for make in the Translate Table, and define values for model in the Car Model Table.

Registration Date and **Color** — Enter the car's registration date and select a color.

Provision Method and **Cost** — Select a provision method using the purchase, lease, and contract hire costs that you defined in the Car Model Table. The system displays the car's cost in the appropriate currency based on the provision method you select. You can override these amounts.

Management Location — Enter a management location for this vehicle from the list. This field is optional. Car management locations are stored on the Car Management Locations page.

(GBR) United Kingdom

Tax Renewal Date — The date that you enter is for informational purposes only.

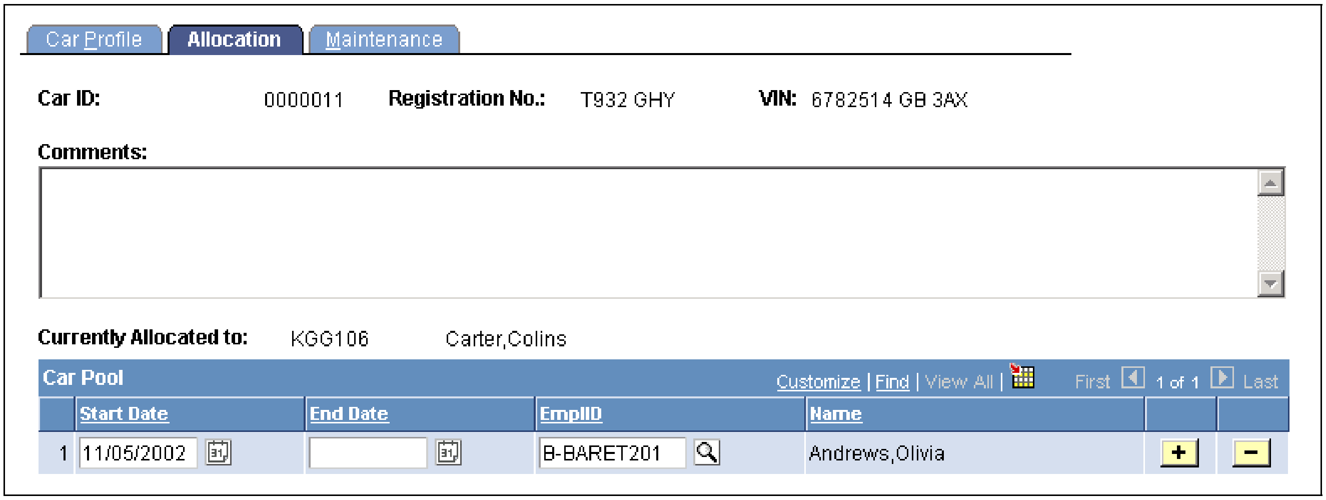
Age of Car — Displays the car's age calculated from the registration date that you entered on the Car Profile page.

Classic Car — Select for cars that are 15 years or older.

Accessories — For each accessory, complete the fields in this group box.

Recording Allocation Information and Tracking Car Pooling Information

Access the Allocation page.

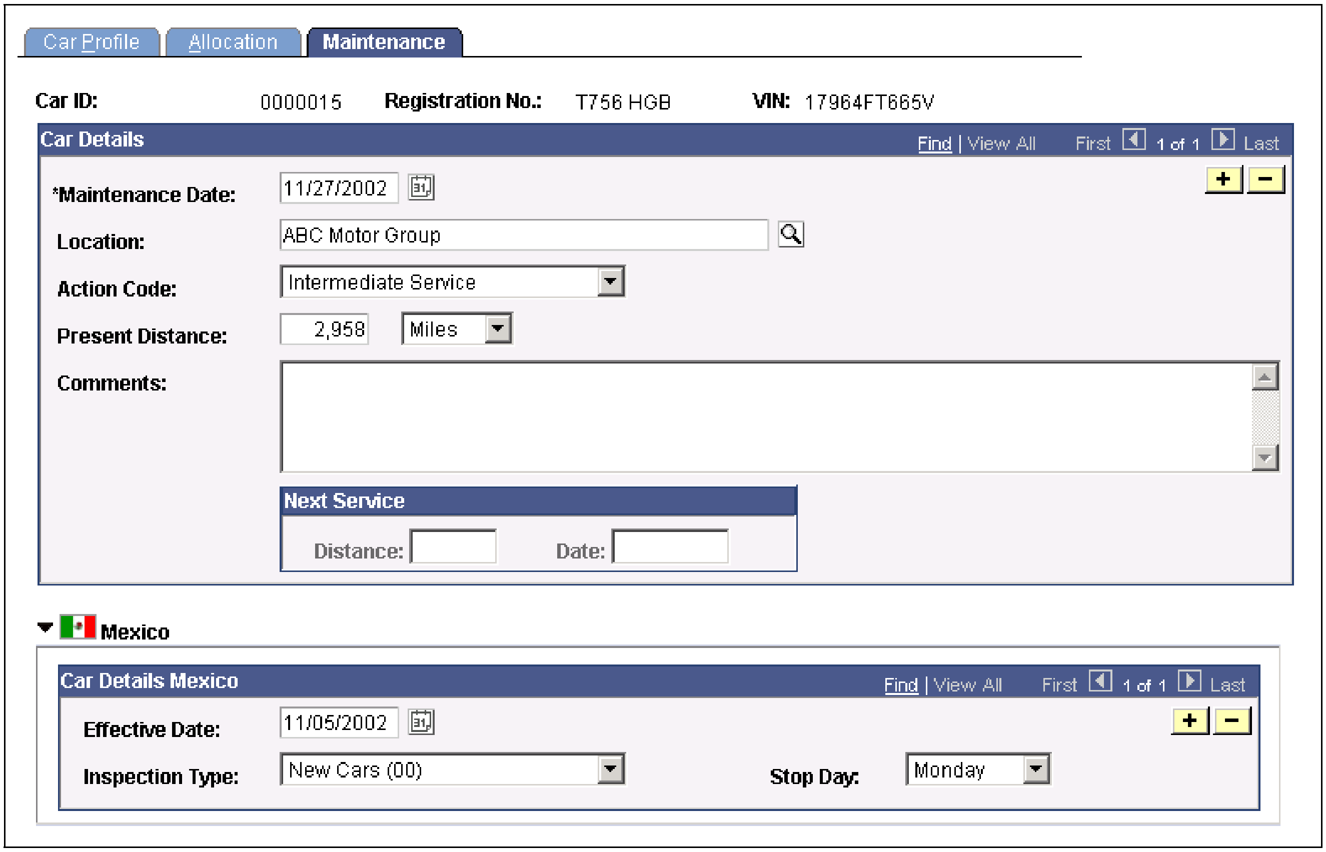


Allocation page

Registration No. (registration number) and **VIN** (vehicle identification number)	Displays the registration number and VIN that you entered on the Car Profile page.
Currently Allocated to	If the car is assigned to an employee on the Company Car Allocation table, the system displays that person's name.
Car Pool	Enter the start date and end date of the car pool, and then enter the employee ID of the person who is responsible for the company car.

Recording Maintenance History

Access the Maintenance page.



Maintenance page

Maintenance Date Enter the date when the car was serviced.

Location Enter a location from the list of locations that you defined on the Car Management Location table. *Garage* is the only location type that appears here.

Action Code Select a value from the list of Translate table values.

Present Distance Enter the car's odometer reading as of the service date. Select *Miles* or *Kms* (kilometers).

Next Service If you selected *Full Service* as the Action Code, enter the distance and date for the car's next service. To enter additional car maintenance and service events, insert a new data row and enter a new maintenance date, if appropriate.

(MEX) Mexico

Because of high pollution levels in Mexico, there are legal requirements for car inspections.

Inspection Type Values include:

Multiple Stop Day (2), New Cars (00), No Stop Day (0), and *One Stop Day (1).*

For example, if a car has an inspection type of *One Stop,* the car must not be used one day of the week.

Stop Day	Depending on the result of the inspection, you may need to specify a stop day when the car cannot be in use. Values include: *Monday, Tuesday, Wednesday, Thursday,* and *Friday.*

CHAPTER 4

Administering Company Cars for Your Workforce

This chapter discusses how to:

- Allocate company cars.
- Track company cars and vehicle incidents.
- Run company car reports.

Allocating Company Cars

This section discusses how to:

- Enroll employees in company car plans.
- Allocate company cars.

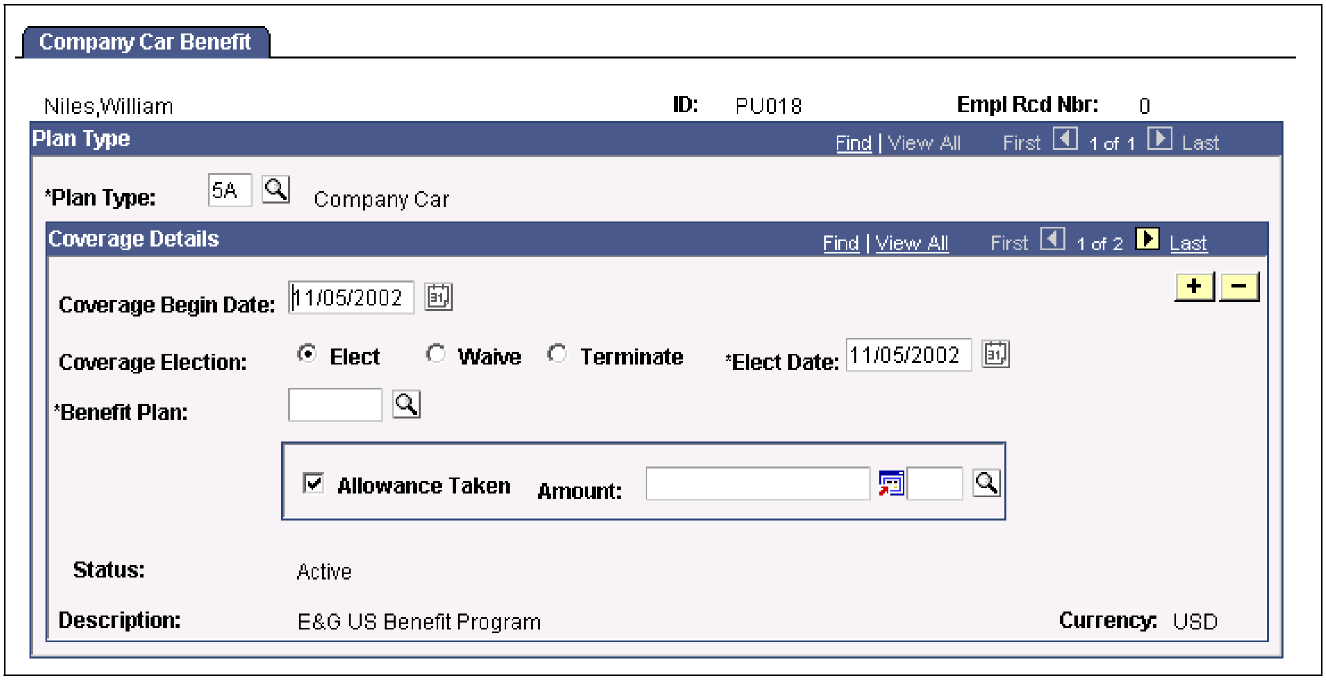
Before allocating cars to employees, enroll them in the benefit plan.

Pages Used to Allocate Company Cars

Page Name	Object Name	Navigation	Usage
Company Car Benefit	CAR_PLAN	Benefits, Provide Company Cars, Select Type of Benefits, Company Car Benefit	Enroll employees in the car benefit plan.
Company Car Allocation	CAR_ALLOCATION	Benefits, Provide Company Cars, Assign Type of Car/Dates, Company Car Allocation	Allocate company cars to employees.

Enrolling Employees in Company Car Plans

Access the Company Car Benefit page.



Company Car Benefit page

Plan Type Displays the default value of *Company Car*.

Coverage Begin Date Enter the start date for the employee's coverage under this plan.

Coverage Election Indicate whether the employee chooses to Elect, Waive, or Terminate their coverage.

Elect Date Enter the date on which the employee elected this coverage.

Benefit Plan Enter a benefit plan from the plans that you set up in the Benefit Plan Table page. Only benefit plans that are in this employee's benefit program are available here.

Allowance Taken Select if this employee chooses an allowance instead of a car.

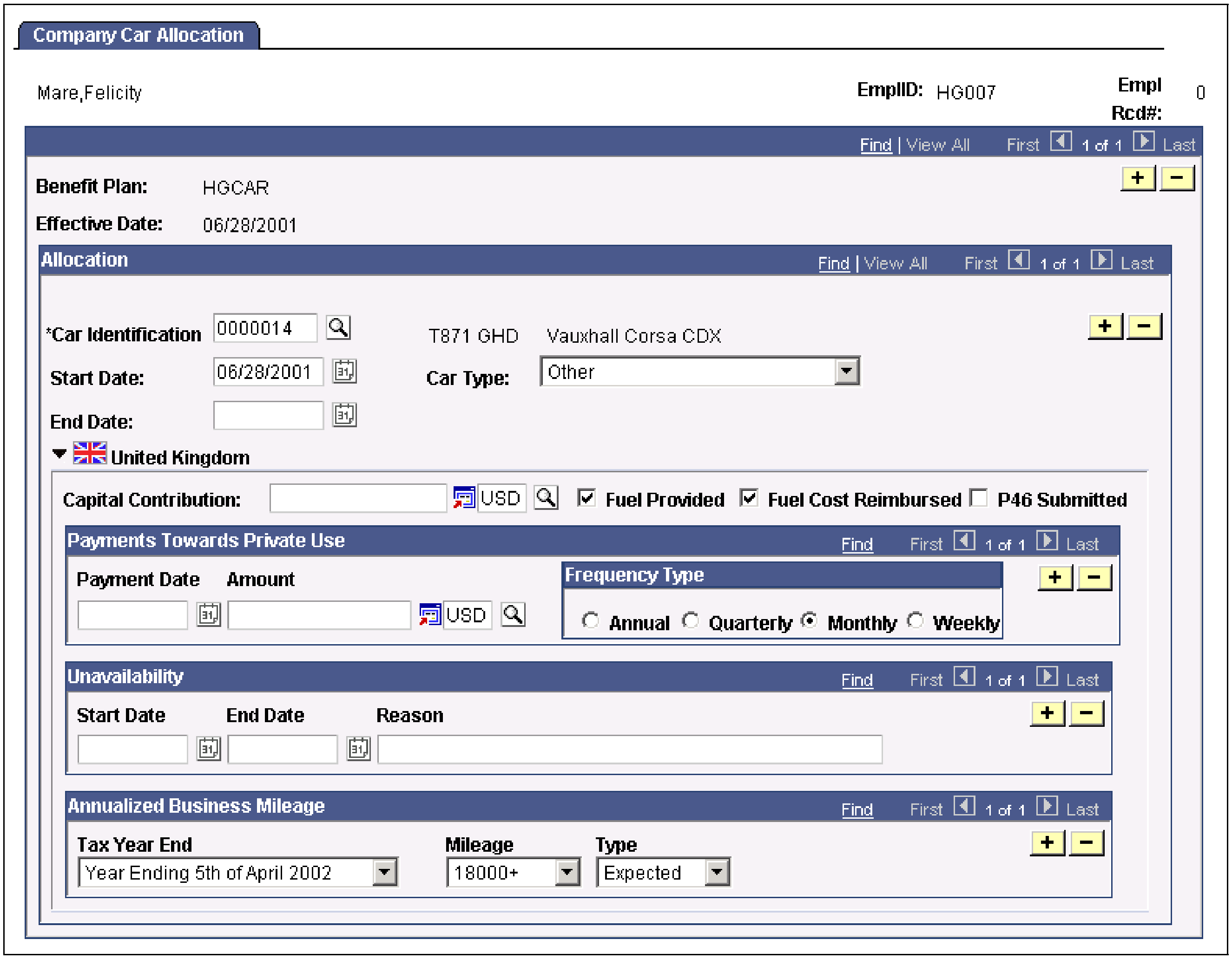
Amount Displays the allowance amount from the Company Car Plan page. You can override the amount, the currency or both. Employees who choose the allowance can't have company cars allocated in the Company Car Allocation page.

See Also

Chapter 3, "Setting Up PeopleSoft Human Resources Administer Company Cars," Pages Used to Set Up the Company Car Benefit, page 9

Allocating Company Cars

Access the Company Car Allocation page.



Company Car Allocation page

Car Identification Enter the code of the car that you want to allocate to the employee. Define values for this field in the Car Data table. Only cars that aren't already allocated or assigned to carpools as of the effective date are available.

Start Date Enter the start date of the allocation.

Car Type Select from these values:

Primary Car, Replacement Car, Secondary Car, or *Other.*

The car type is used in the P46 (Car) report that is provided with Global Payroll for the U.K.

End Date Enter a date when the employee is scheduled to (or does) return the car.

(GBR) United Kingdom

This information is required for the P46 (Car) report that is provided in PeopleSoft Global Payroll for the U.K.

Capital Contribution	If the employee makes any capital contributions toward the car, enter the amount and the currency code.
Fuel Provided	Select if you supply fuel to the employee for private use.
Fuel Cost Reimbursed	Select if the employee reimburses the total cost.
P46 Submitted	Select if you've submitted the P46 (Car) report to the Inland Revenue. If you have PeopleSoft Global Payroll for the U.K., you can generate this report automatically.

Payments Towards Private Use

Complete this group box if the employee makes any payments for private use of the car.

Payment Date and **Amount**	Enter the date on which the employee started making payments and enter the amount of each payment.
Frequency Type	Select the frequency of the employee's payments.

Unavailability

Indicate any period when the car is unavailable.

Annualized Business Mileage

Track the distance that the car is driven on business. Only mileage ranges are required for tax purposes.

Tax Year End and **Mileage**	To identify the mileage for a particular tax year, select the Tax Year End value and the range of business mileage
Type	Values are: *Actual:* Select at the end of the tax year when a more accurate value is available. *Expected:* Select to enter an estimate for the current tax year.

Tracking Company Cars and Vehicle Incidents

This section discusses how to:

- Calculate P11D Information benefit amounts.
- (GBR) Verify P11D Information calculation results online.

To use PeopleSoft Monitor Health and Safety to track vehicle incidents related to company cars, you must define each car as an item of company property. Do this on the Company Property Table Setup page. Once you define a car as company property, use the Incident Data and Vehicle/Equipment Detail pages to record details of any incidents involving the employee and the car, or use the Monitor Health and Safety menus.

(GBR) Understanding Tracking Local Functionality

You can allocate a company car, without transfer of property, to a director or employee earning more than the statutory threshold. This car is then also available to the employee or director for private use.

There are various tax implications when you allocate a company car to an employee. Your company pays tax in the form of Class 1A National Insurance Contributions (NICs). Your employees pay income tax based on their tax codes, which is adjusted to take into account the taxable benefit of the car. In both cases, the taxable benefit is based on the list price, business mileage, age, and periods of unavailability of the car. To find out more about your legal requirements, contact the Inland Revenue.

This section describes how to determine the car and fuel benefit amounts for the given tax year to meet P11D Information requirements for U.K. companies. The system collates details for each employee from the various Company Car pages.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents," Pages Used to Enter New Health and Safety Incidents

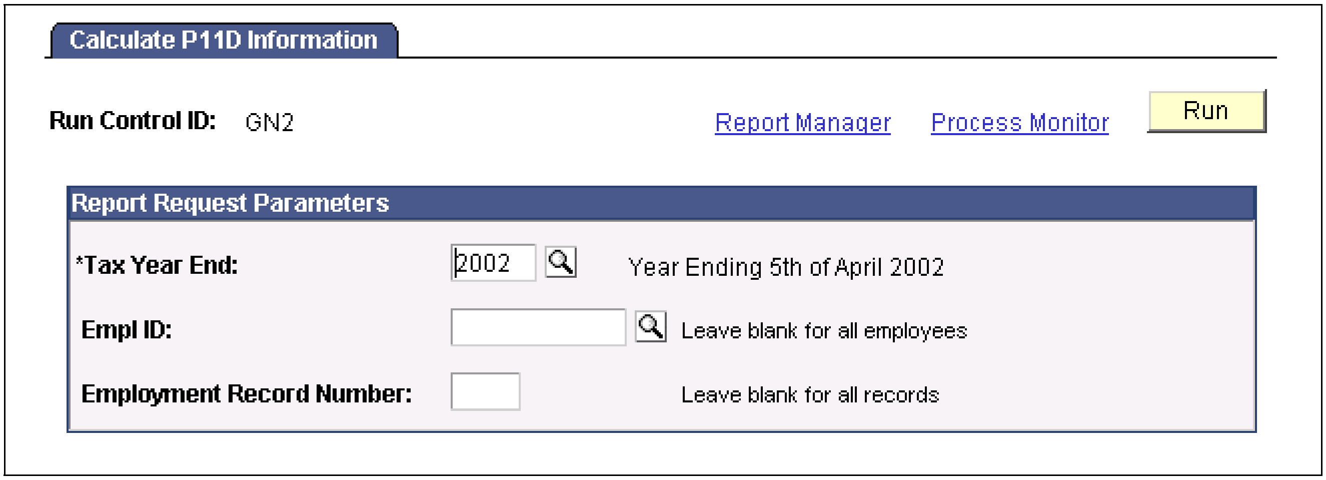
PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents," Pages Used to Enter Data for Vehicles and Equipment

(GBR) Pages Used to Determine Car and Fuel Benefit Amounts

Page Name	Object Name	Navigation	Usage
Calculate P11D Information	RUNCTL_COMPCAR001	Benefits, Provide Company Cars, Calculate P11D Information, Calculate P11D Information	To calculate the P11D Information amounts, run the CAR001 process. You can run the report for one employee at a time or for all eligible employees.
Verify P11D Information	P11D_SEC_A_UK	Benefits, Provide Company Cars, Verify P11D Information, Verify P11D Information	Verify P11D Information calculation results online.
Process Notes	P11D_NOTES_UK	Benefits, Provide Company Cars, Verify P11D Information, Process Notes	View benefit calculation details.

Calculating P11D Information Benefit Amounts

Access the Calculate P11D Information page.

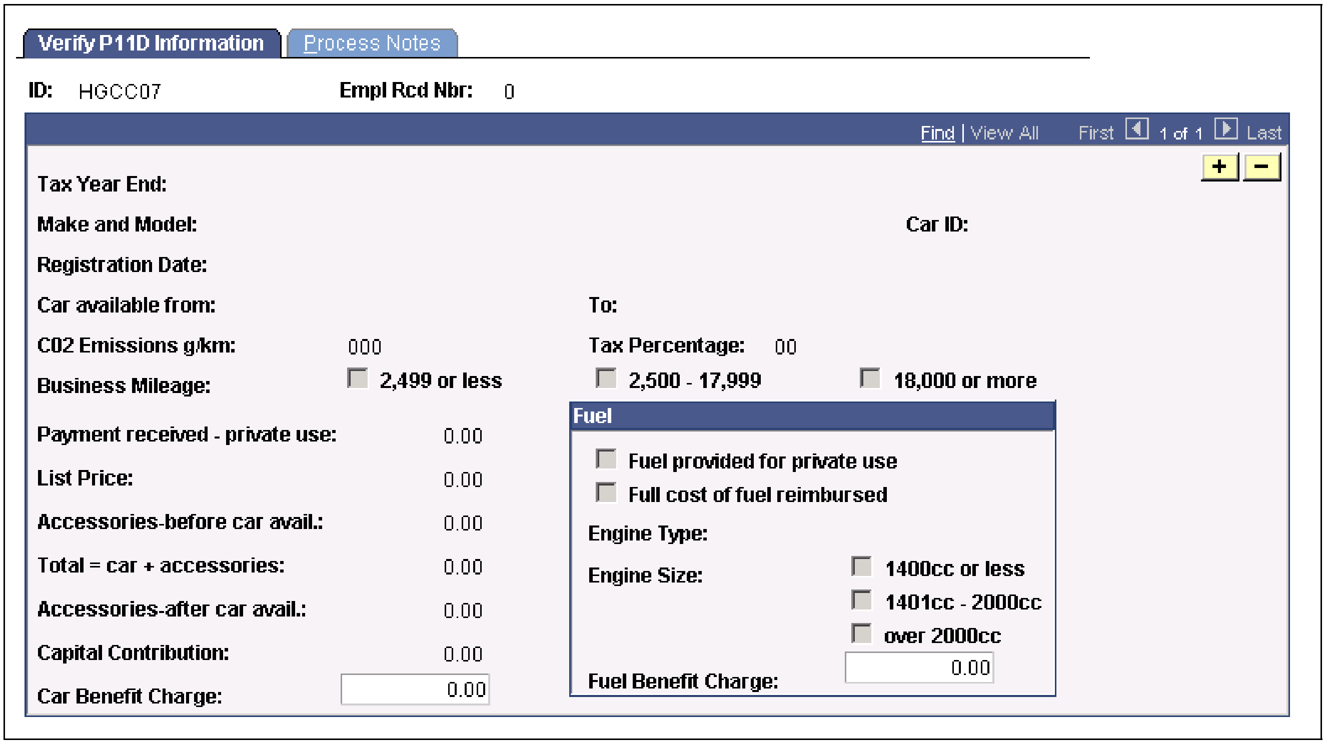


Calculate P11D Information page

Run Control ID	Displays the run control ID that you entered.
Tax Year End	Define values on the Translate table
Empl ID (employee identification)	Leave this field blank to run the report for all eligible employees, or enter an ID to run the report for only one employee.
Employment Record Number	Leave this field blank to run the report for all employee records, or enter an employment record number to run the report for only one employee record.
Run	Click this button to calculate P11D Information.

(GBR) Verifying P11D Information Calculation Results Online

Access the Verify P11D Information page.



Verify P11D Information page

Each data row relates to a car for the employee per tax year. If an employee had two cars during the tax year, there are two data rows for that employee. If an employee had the same car for two tax years, there are also two rows of data. Use the scroll arrows to move between rows.

If you find errors in the display-only fields on the page, update the core data and rerun CAR001.

Tax Year End, Car available from and **Payment received - private use**

Display values that you defined on the Company Car Allocation page.

Make and Model and **Registration Date**

Display values that you defined on the Car Profile page.

CO2 Emissions g/km (carbon dioxide emissions in grams per kilometer) and **Tax Percentage**

Displays value that you defined on the Emissions Data UK page.

Business Mileage

Select from: *2,499 or less, 2,500 − 17,999,* or *18,000 or more.*

List Price

Displays the value that you defined on the Car Model page.

Accessories-before car avail. (accessories-before car available), **Total = car + accessories,** and **Accessories-after car avail.** (accessories after car available)

Displays values that you defined on the Car Profile page.

Car Benefit Charge and **Fuel Benefit Charge**	Adjust benefit charge amounts that require complex manual calculations.
Capital Contribution, Fuel provided for private use and **Full cost of fuel reimbursed**	Display values that you defined on the Company Car Allocation page.
Engine Type and **Engine Size**	Displays values that you defined on the Car Model page. Values are: *1400cc or less, 1401cc − 2000cc,* and *over 2000cc*

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents," Entering Additional Incident Data for Vehicles and Equipment

Running Company Car Reports

This section discusses how to run company car reports.

Pages Used to Run Company Car Reports

Page Name	Object Name	Navigation	Usage
Car List	PRCSRUNCNTL	Benefits, Provide Company Cars, Create List of Cars, Car List	Run the Car List report (CAR003) that produces a list of cars in the company's fleet and list basic information.
Print P11D Information	RUNCTL_COMPCAR001	Benefits, Provide Company Cars, Print P11D Information	Run the Print P11D Information report (CAR002) to print the results from the CAR001 process in a format similar to the U.K. government form P11D. You can run the report for a selected employee or all eligible employees in a given tax year. Before using this page, you must have run the CAR001 report process.

CHAPTER 5

(GBR) Defining Tax Percentages and Engine Types

In the United Kingdom , the government bases the automobile tax charge on a percentage of the car price graduated according to the level of the car’s carbon dioxide (CO_2) emissions. See the CO_2 Emissions Tax Table on the Inland Revenue site for appropriate charges.

Use the emissions data table to add new rates or adjust the values of rates that are already defined in the system.

The system also contains predetermined data for engine types and the associated discounts. Use the engine type table to add new engine types and discounts or adjust the values already defined in the system.

These discounts apply only to cars that were first registered on January 1, 1998 or later.

This chapter discusses how to define tax percentages and engine types.

Defining Tax Percentages and Engine Types

This section discusses how to:

- Define tax percentages.
- Define engine types.

Pages Used to Tax Percentages and Engine Types

Page Name	Object Name	Navigation	Usage
Emissions Data UK	EMISSIONS_DATA_UK	Benefits, Provide Company Cars, Define Emissions Data, Emissions Data UK	Define tax percentages by year and gram per kilometer emissions per regulations.
Engine Type UK	ENGINE_TYPE_UK	Benefits, Provide Company Cars, Define Engine Type, Engine Type UK	Define engine types and determine the associated tax discounts per regulations.

Defining Tax Percentages

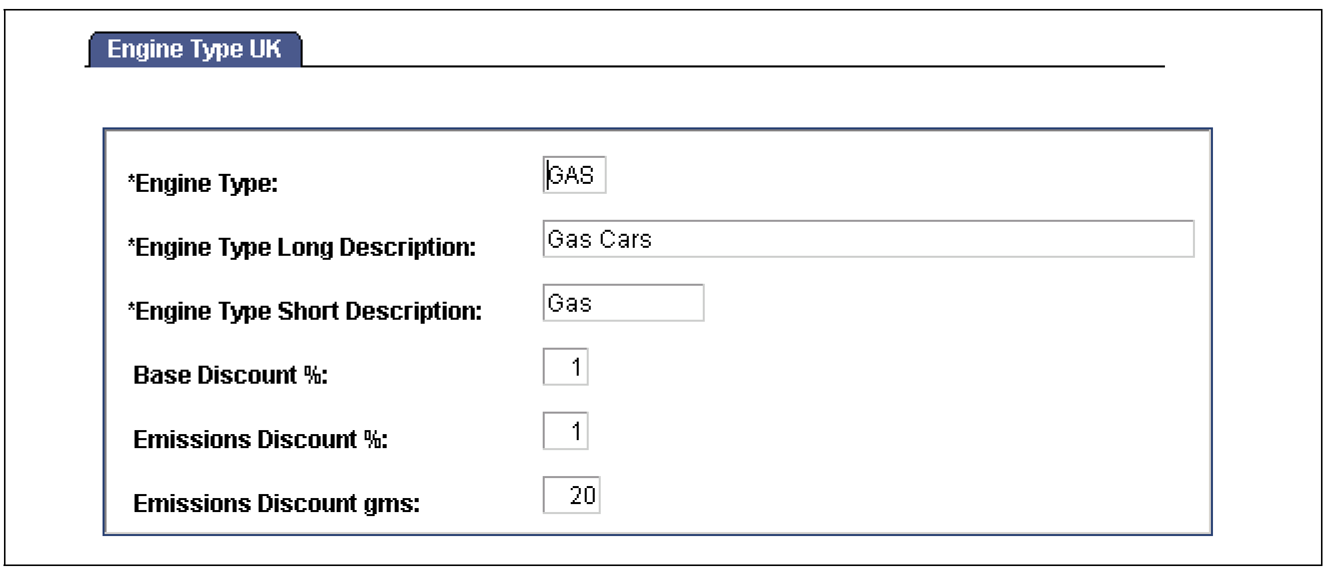
Access the Emissions Data UK page.

Emissions Data UK page

Tax Percentage	Displays the tax percentage that you entered to access the page.
Tax Year End	Enter the tax year that defines the taxation rate.
CO2 Emissions g/km	Enter the associated carbon dioxide emissions as grams per kilometer.

Defining Engine Types

Access the Engine Type UK page.



Engine Type UK page

Engine Type	Displays the engine type that you entered to access the page.
Base Discount % (base discount percentage)	Enter the base discount that is associated with this engine type.
Emissions Discount % (emissions discount percentage)	Enter an additional emissions discount if one is applicable.
Emissions Discount gms (emissions discount grams)	For hybrid-electric vehicles, enter an additional discount. The discount calculates as 1 percent of the price for each full 20g/km

by which the CO_2 emissions figure is below the qualifying level for the minimum charge for the year.

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 anotherand 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 methodit 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 *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* 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 activitys 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 youre 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 valuesdynamic detailsdirectly 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 *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations 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 *Enterprise Incentive Management ledger.* 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, *event* 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 *activity.*
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 *rates*) 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 applicationfor 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 addressesfor 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 locationindicated by a *1*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 provide 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 *participant object.*

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 contextif 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 *Batch Processes.*

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 *record input value-added tax flag.* 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 *record output value-added tax flag.*

See *record input VAT flag.*

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 takesemail 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 activitycharacteristics 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 *Structured Query Report (SQR).*

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 *basis* 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: http://serverx/InternetClient /InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_ 401k.PAGES.FieldFormula.iScript_Home401k

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.

Index

T

U

V

W