PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook:
Track Global Assignments

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Human Resources PeopleBook:
Track Global Assignments
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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.

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Contact CPI at 800 888 3559.

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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 Track Global Assignments 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: Track Global Assignments* 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 Track Global Assignments

This chapter provides an overview of PeopleSoft Human Resources Track Global Assignments business processes and discusses:

- PeopleSoft Human Resources Track Global Assignments integrations.
- PeopleSoft Human Resources Track Global Assignments implementation.

PeopleSoft Human Resources Track Global Assignments Business Processes

PeopleSoft Human Resources Track Global Assignments provides the following business processes:

- Track assignee qualifications.
- Track assignments.
  - Manage assignments.
  - Track dependent information.
  - Track company paid travel.
  - Track assignment compensation.
- Track educational allowances.

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

PeopleSoft Human Resources Track Global Assignments Implementation

The PeopleSoft Human Resources Track Global Assignments table-loading implementation can be divided into two phases: fundamental and core. Set up tables to enable your system to support PeopleSoft Human Resources Track Global Assignments features.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences. A complete list of these resources appears in the preface in the *PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, with information about where to find the most current version of each.

This section includes tables that guide you through these phases:

- Setting up PeopleSoft HRMS fundamental tables.
- Setting up core PeopleSoft Human Resources Track Global Assignments tables.

Important! The order in which you set up tables required to implement PeopleSoft Human Resources Track Global Assignments may vary; each individual application isn't necessarily set up in sequence. For example, you may set up PeopleSoft HRMS tables, then tables for the PeopleSoft Human Resources Track Global Assignments core application, then several tables specific to the country or industry in which you operate, followed by additional PeopleSoft Human Resources Track Global Assignments core tables. In addition, 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 PeopleSoft 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

PeopleSoft Human Resources Track Global Assignments requires that you set up the fundamental PeopleSoft HRMS tables, which are common to multiple PeopleSoft HRMS applications. Follow these steps to define information in the PeopleSoft HRMS fundamental tables. The information that you define in these tables lays the foundation for the PeopleSoft Human Resources Track Global Assignments 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"
2. Set up PeopleSoft Human Resources fundamental tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook,* "Getting Started With PeopleSoft HRMS"

Setting Up Core PeopleSoft Human Resources Track Global Assignments Tables

The steps that are discussed in this section suggest the order in which you define information in the core PeopleSoft Human Resources Track Global Assignments tables. The information that you defined in the fundamental tables has laid the foundation for this setup.

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

- Track assignments.
- Track assignment specific compensation.
- Track assignment educational allowance.

Step	Reference
1. Define global assignment types.	Chapter 4, "Setting Up Global Assignments," Defining Global Assignment Types, page 14
2. Define company paid travel types.	Chapter 4, "Setting Up Global Assignments," Classifying Types of Company-Paid Travel, page 15
3. Define deductions and earnings.	Chapter 4, "Setting Up Global Assignments," Adding Deduction Codes and Classification Information, page 17
4. Set up education data.	Chapter 4, "Setting Up Global Assignments," Entering School and Orientation Program Information, page 20

CHAPTER 2

Understanding PeopleSoft Human Resources Track Global Assignments

This chapter provides a brief overview of PeopleSoft Human Resources Track Global Assignments and discusses:

- PeopleSoft Human Resources Track Global Assignments business processes.
- PeopleSoft Human Resources Track Global Assignments integrations.
- Designing PeopleSoft Human Resources Track Global Assignments.

PeopleSoft Human Resources Track Global Assignments

PeopleSoft Human Resources Track Global Assignments enables you to assign employees to a global assignment and to monitor, compensate, and track education and qualification for the employees and their dependents as they move from project to project in your organization's operations in multiple countries.

PeopleSoft Human Resources Track Global Assignments Business Processes

PeopleSoft Human Resources Track Global Assignments provides the following business processes:

- Track assignees qualifications.

  Track assignees qualifications for assignments, such as education, languages, and competencies.

- Track assignments.
  - Manage assignments.

    Manage assignees assignment details, such as their home base job information and their job information (host) while on assignment, in addition to assignment beginning and end dates, travel details, residence details, and vehicle assignments.

  - Track dependent information.

    Track information about assignee's dependents.

  - Track company paid travel.

    Track company paid travel or assignees and their dependents.

- Track assignment compensation.

  Track employee compensation that results from an assignment.

- Track educational allowances.

  Track educational allowances for assignees and their dependents.

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

See Also

Chapter 5, "Tracking Assignments," page 23

Chapter 6, "Managing Educational Allowances," page 45

PeopleSoft Human Resources Track Global Assignments Integrations

PeopleSoft Human Resources Track Global Assignments integrates with the following PeopleSoft applications:

- PeopleSoft Human Resources Manage Competencies
- PeopleSoft Human Resources Administer Workforce

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Understanding Enterprise Integration Points in HRMS," Understanding HRMS EIPs that Publish Only

CHAPTER 3

Using Global Assignments

This chapter discusses how to use global assignments to manage employees on assignment.

Understanding Global Assignments

If your organization has operations in more than one country, you process large amounts of information about employees as they move from project to project. PeopleSoft Human Resources enables you to ensure smooth transitions for employees on global assignments.

You can manage temporary assignments for:

- Expatriate employees.

  Home base employees who work in other countries or locations.
- Inpatriate employees.

  Employees from other countries who work in your organization's home country.
- Third country nationals.

  Employees who are citizens of one country and have a home base in a second country but go on assignment to a third country. For example, a Canadian citizen with a home base in the U.S. may go on assignment to Saudi Arabia.

Temporary Versus Permanent Assignments

Before you begin to administer a new assignment, determine whether the assignment is temporary or permanent.

Temporary Assignments

In a temporary assignment, you expect the employee to return to a home base when the assignment ends. An assignment is considered temporary even if it lasts up to several years.

Before the employee leaves for a temporary global assignment, you establish a home base (where the employee is permanently based) for the employee where you keep central employee, benefit, and payroll data for that employee. Create new records to track employee data for the new location. The new location is referred to as the host location.

You maintain two sets of employee data: one set is home data and the other is host data for the new assignment abroad. To keep two sets of current data for an employee, you create new employment record numbers, which precludes you from overwriting existing home information.

Permanent Assignments

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

See *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Hiring Your Workforce".

Managing Employees on Global Assignment

To manage employees on global assignment:

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

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

CHAPTER 4

Setting Up Global Assignments

This chapter provides an overview of global assignments and discusses how to set up:

- Security for global assignments.
- Assignment types.
- Travel types.
- Deduction, tax, and earning codes for assignment compensation.
- Assignee qualifications.
- School and program data for assignee education.

Implementing Employee Data Security for Global Assignments

This section provides an overview of employee data security and discusses:

- Security access setup for global assignments.
- Security for one home and one host.
- Security for one home and multiple, concurrent hosts.
- Security for permanent transfers.

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

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

Security Access Setup for Global Assignments

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

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Administering PeopleSoft Security," Choosing a Security Type

PeopleTools PeopleBook: PeopleSoft Application Designer

Security for One Home and One Host

Often, employees have data pertaining to one home and one host: they have one permanent job and go on one assignment after another, sequentially. To show you how organizational security works, in this section PeopleSoft looks at a few examples of simple and complex global assignment situations involving Yves Chabot, an employee permanently based at KF1 company headquarters in France, in department *13000* If you have set up your global assignment system by running the script SECVWITL and rebuilt all of your security search views, then you can follow this example in the sample data.

Step 1: First Assignment

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

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

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

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

Step 2: Second Assignment - Consecutive

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

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

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

Employment Record	Department	DPGBR	DPAUS
0	13000	No Access	Access
1	12000	No Access	Access

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

Security for One Home and Multiple, Concurrent Hosts

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

Step 1: Second Assignment - Concurrent

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

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

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

Employment Record	Department	DPFRA	DPAUS	DPSGP
0	13000	Access	Access	Access
1	12000	Access	Access	Access
2	15000	Access	Access	Access

Step 2: First Assignment Completed

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

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

Employment Record	Department	DPFRA	DPAUS	DPSGP
0	13000	Access	Access	Access
1	12000	Access	Access	Access
2	15000	Access	Access	Access

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

Security for Permanent Transfers

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

Step 1: Second Assignment Completed

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

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

Employment Record	Department	DPFRA	DPAUS	DPSGP
0	13000	Access	Access	Access
1	12000	Access	Access	Access
2	15000	Access	Access	Access

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

Step 2: Permanent Transfer

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

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

Employment Record	Department	DPFRA	DPAUS	DPSGP
0	13000	No Access	Access	Access
1	12000	No Access	Access	Access
2	15000	No Access	Access	Access

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

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

Note. If you use Global and Local Country functionality with PeopleSoft Human Resources: Administer Workforce, then address additional security considerations.

See Also

Chapter 4, "Setting Up Global Assignments," Security Access Setup for Global Assignments, page 10

Defining Global Assignment Types

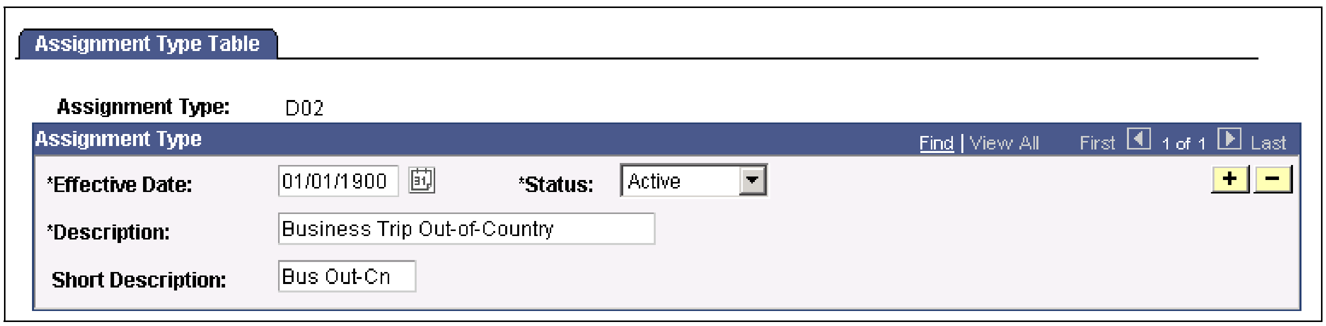
This section discusses how to create new types of employee assignments.

Page Used to Define Global Assignment Types

Page Name	Object Name	Navigation	Usage
Assignment Type Table	ASSGN_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Assignment Type Table	Create new types of employee assignments.

Creating New Types of Employee Assignments

Access the Assignment Type Table page.



Assignment Type Table page

(DEU) Defining German Assignment Types

When entering assignment types for Germany, select from these options:

Type	Description
A01	*Assignment In-Country*
A02	*Assignment Expat DBA taxfree*
A03	*Assignment Expat DBA taxable*
A04	*Assignment Expat ATE taxfree*
A05	*Assignment Expat ATE taxable*
D01	*Business Related Travel In-Country*

Type	Description
D02	*Business Related Travel Out-of-Country*
D03	*Assembly Assignment DBA taxable*

Classifying Types of Company-Paid Travel

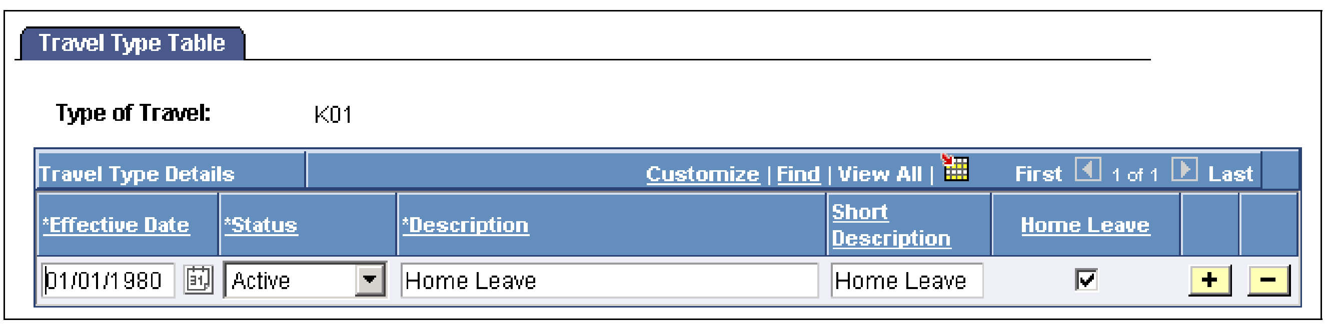
This section discusses how to classify types of company-paid travel.

Pages Used to Classify Types of Company-Paid Travel

Page Name	Object Name	Navigation	Usage
Travel Type Table	TRAVEL_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Travel Type Table	Classify types of company-paid travel. Use the codes that you set up here to make travel arrangements for employees and their dependents in the Company Paid Travel page.

Classifying Types of Company-Paid Travel

Access the Travel Type Table page.



Travel Type Table page

Home Leave Select to indicate that an employee is going on leave to his or her home (permanent) location.

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

Defining Deductions and Earnings for Assignment Compensation

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

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

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

If your organization is *not* using PeopleSoft Payroll for North America and you want to track assignment compensation, set up deduction, tax, and earnings information on the Earnings and Deductions components. This section discusses how to:

- Add deduction codes and classification information.
- Define tax treatments.
- Add earnings codes.

You can track assignment compensation on the Assignment Compensation component.

See Chapter 4, "Setting Up Global Assignments," Adding Deduction Codes and Classification Information, page 17.

Note. Use the Payroll for North America Earnings and Deductions tables (Set Up HRMS, Product Related, North American Payroll) to set up earnings and deductions if you are using PeopleSoft Payroll for North America. The global assignments tables do not contain enough information to substitute for the payroll tables.

Make the tables in the Global Assignments menu display-only to ensure that all updates take place using the pages in North American Payroll.

See Also

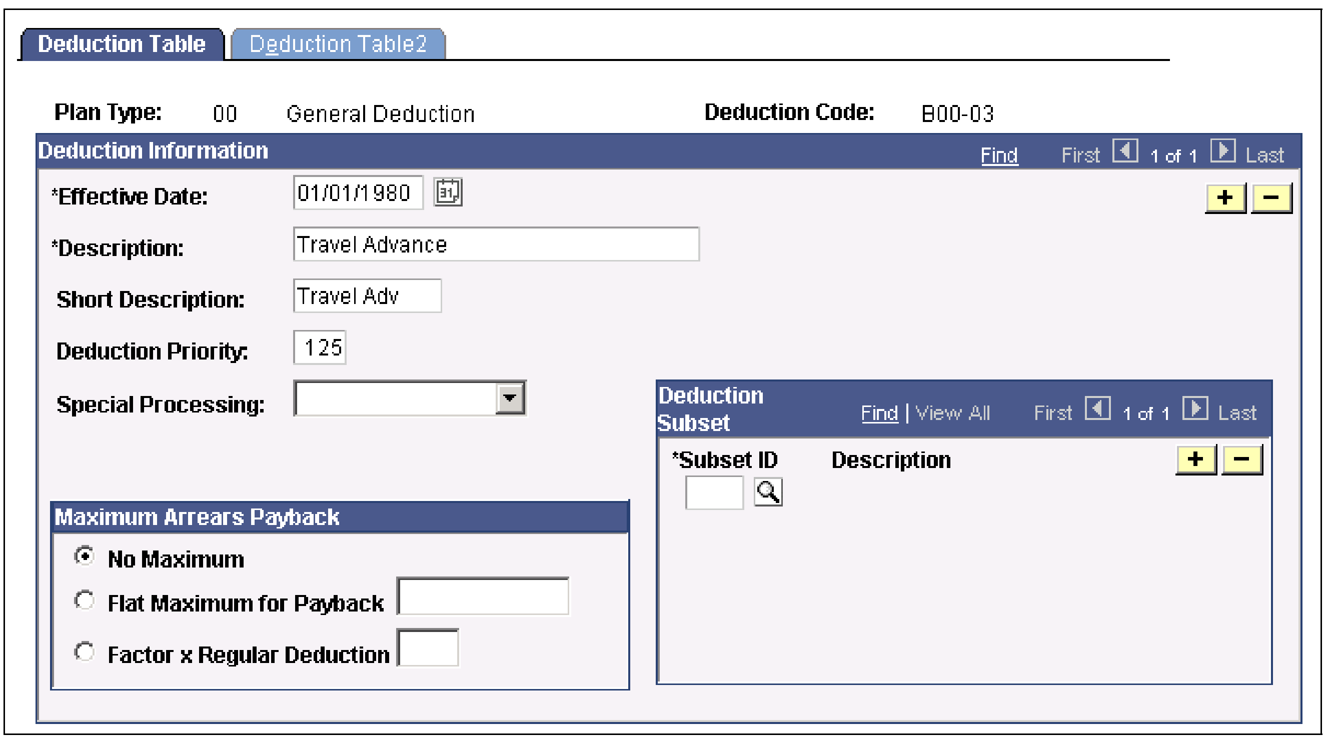
PeopleSoft 8.8 Payroll for North America PeopleBook, "Defining Earnings Codes and Earnings Programs"

Pages Used to Define Deductions and Earnings for Assignment Compensation

Page Name	Object Name	Navigation	Usage
Deduction Table	DEDUCTION_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Deductions	Add deduction codes and classification information.
Deduction Table2	DEDUCTION_TABLE2	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Deductions, Deduction Table2	Define tax treatments for assignment deductions.
Earnings Table	EARNINGS_TABLE1	Set Up HRMS, Product Related, Workforce Administration, Global Assignments, Earnings, Earnings Table	Add earnings codes for global assignments.

Adding Deduction Codes and Classification Information

Access the Deduction Table page.



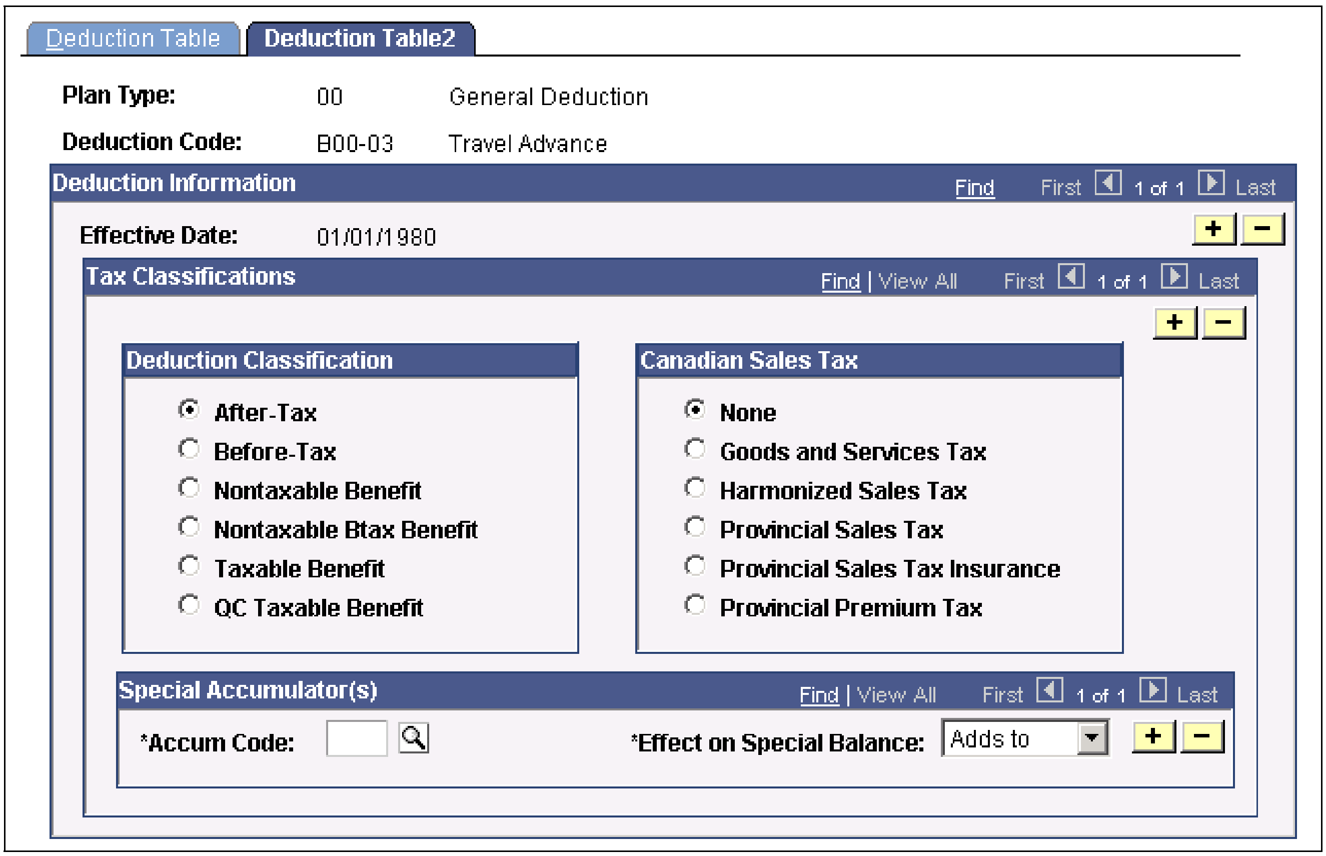
Deduction Table page

For deduction codes for global assignments, enter a Plan Type of *00.*

Warning! Enter information in these fields *only:* Effective Date, Description, and Short Description. Otherwise, the system assumes that the code that you define here is for payroll purposes when you enter the code in other assignment pages. You could also receive an error message if you didn't fill in all of the required fields on the other pages for the table in the Pay Process menu.

Defining Tax Treatments

Access the Deduction Table2 page.



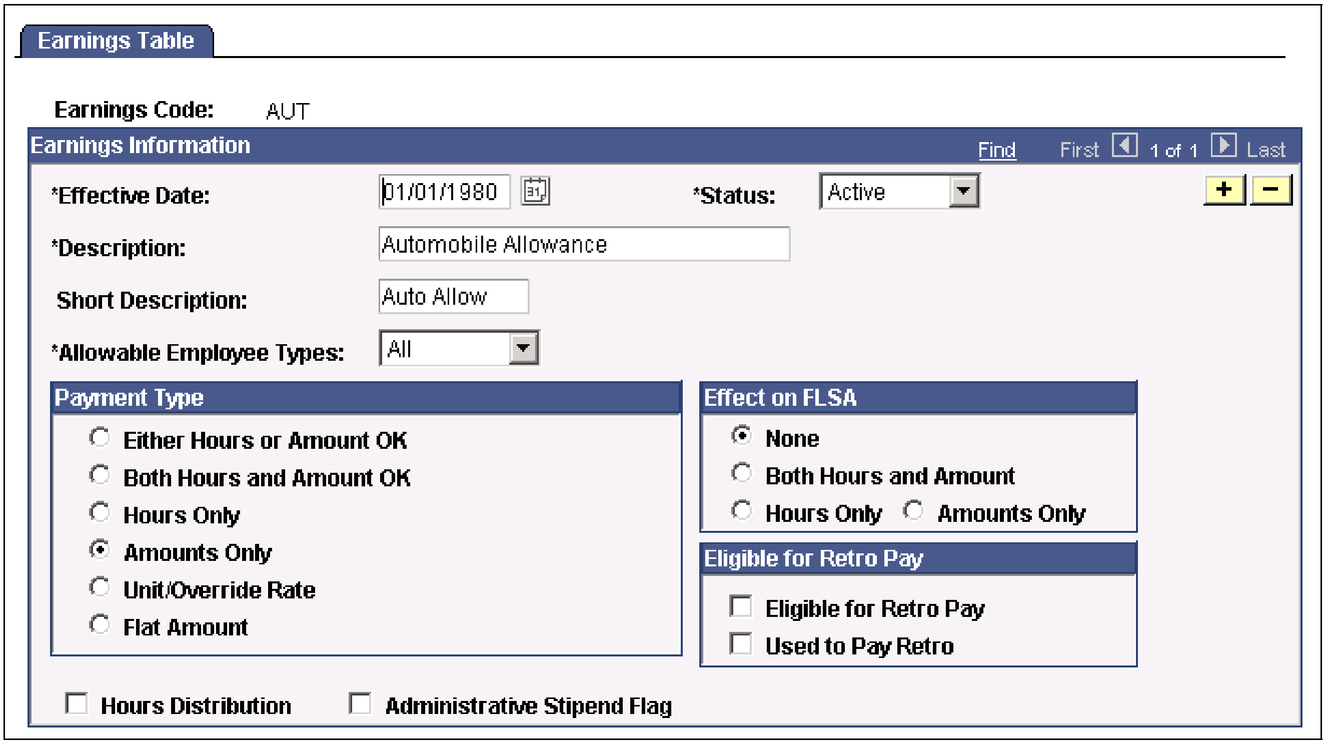
Deduction Table2 page

Deduction Classification Select a deduction type.

Canadian Sales Tax Select the type that is required in Canada.

Adding Earnings Codes

Access the Earnings Table page.



Earnings Table page

Warning! Enter information in these fields *only:* Effective Date, Description, and Short Description. Otherwise, the system assumes that the code that you define here is for payroll purposes when you enter the code in other assignment pages. You could also get an error message because you didn't fill in all of the required fields on the other pages for the table in the Pay Process menu.

Setting Up Education Data for Assignment

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

If your organization offers education allowances for employees or dependents set up information about the schools and programs available to your employees and their dependents.

This section discusses how to:

- Set up school and program information.
- Set up and maintain contacts for schools and programs.

Setting Up Majors

Use the Majors page if you need to set up a new Major for global assignments.

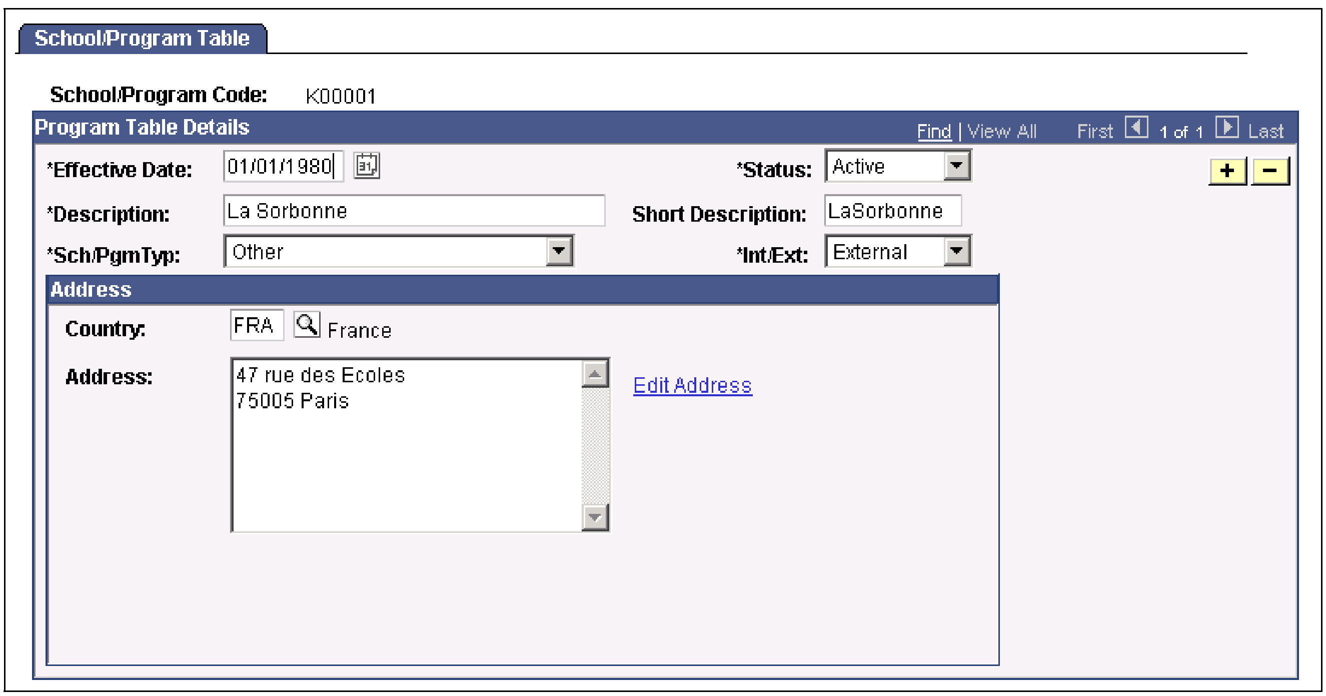
See *PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*.

Pages Used to Set Up Assignment Educational Data

Page Name	Object Name	Navigation	Usage
School/Program Table	INTL_SCHPGM_TABLE	Workforce Administration, Global Assignments, Define Education and Related Info, School/Program Table	Enter school and program information.
School/Program Contact Table	INTL_CONTACT_TABLE	Workforce Administration, Global Assignments, Define Education Related Info, School/Program Contact Table	Track contacts for schools and programs. **Note.** You must already have set up information for international schools and programs in the School/Program table.

Entering School and Orientation Program Information

Access the School/Program Table page.



School/Program Table page

Sch/Pgm Typ (school or program type) — Select a school or program type. Options are: *Language School, Private School,* and *Public School.*

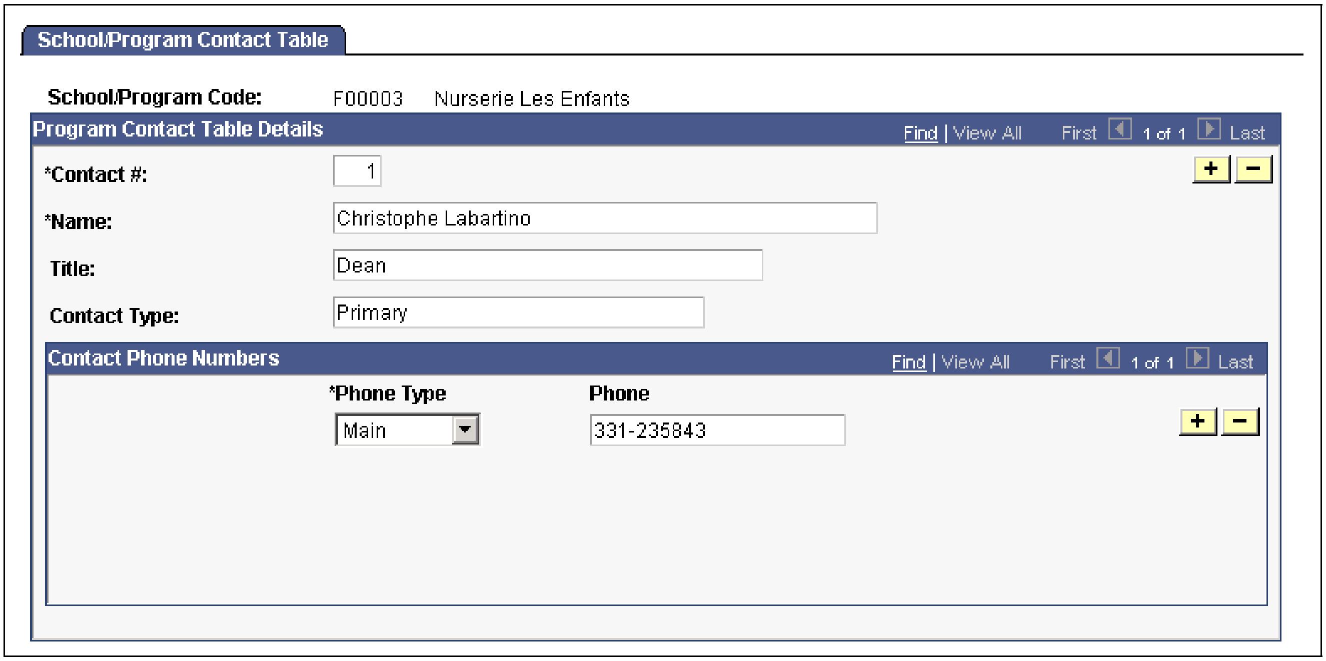
Int/Ext (internal or external) — Select *Internal* to your organization or *External.*

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Setting Up Local Country Functionality”

Tracking Contacts for Schools and Programs

Access the School/Program Contact Table page.



School/Program Contact Table page

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

Contact Phone Numbers Select the phone type and enter the phone number for the contact. Add new data rows to list more than one contact phone number for each contact.

CHAPTER 5

Tracking Assignments

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

Note. Before you process a global assignment, a human resources record and employee ID must already exist in the PeopleSoft Human Resources system for the employee.

In addition, an assignment is a type of concurrent job so ensure that the Multiple Jobs Allowed check box on the PeopleTools Options page is selected so that you can use multiple employment record numbers for employees.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Working With Multiple Jobs"

Creating Checklists

Much of the information that you process for different assignment types and countries remains constant. To save yourself work (and data entry errors or omissions), create standard checklists to streamline global assignment processing. For special situations, use standard checklists as the basis for creating modified checklists.

Set up checklists using the Checklist Item Table and Checklist Table (Set Up HRMS, Common Definitions, Checklists). To tailor a checklist for an employee, use the Employee Checklist page (Workforce Administration, Personal Information, Create Checklist for a Person).

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Overview of the Hiring Process," Hiring When You Use the Manage Positions Business Process

Managing Employee Home and Host Data

Use the Home/Host Information component to manage and review your employees' home base and host location information and to create job records for assignments.

This section discusses how to:

- Define and maintain home location information.
- Define and maintain host location information.
- Begin assignments.
- End assignments
- Transfer an employee to their assignment permanently.
- Use the Home/Host Information component to manage home, host, and assignment job records.

Setting Up the Home Location

To manage employee global assignments, first establish an employee's permanent, or *home*, location and data. The home location is the place to which the employee returns once a temporary assignment ends and the home data is the employee's job data when not on assignment.

If you have hired an employee into the PeopleSoft Human Resources system, the employee has an employment record that serves as the home information. If the employee is a new employee who doesn't have a personnel record in PeopleSoft Human Resources, then enter the employee into the system before processing the assignment.

When you access the Home/Host Information component using the employee's home Empl Rcd#, the Home Host page displays the job information associated with that record and the Home/Host field on the Home Host page displays a value of *Home*. Change this information from the Job Data component.

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

See Also

Chapter 5, "Tracking Assignments," Managing Assignments With Multiple Home or Host Data Records, page 29

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce"

Setting Up the Host Location

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

The first time that you add host data for a new assignment, create a new employment record on the Home/Host Information component. When you create a new employment record on the Home/Host Information component, the Home/Host field on the Home Host page displays *Host* value.

When you create a host employment record, the job information fields are available for entry on the Home Host page. When you save the new host information, the system stores the data in the employee's employment, job, and benefit program participation tables. These are the same tables in which all standard employee data is stored.

When one global assignment ends, reuse the same employment record and enter a new data row for the new assignment.

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

See Also

Chapter 5, "Tracking Assignments," Managing Assignments With Multiple Home or Host Data Records, page 29

PeopleSoft 8.8 Human Resources PeopleBook: Manage Positions, "Setting Up Positions"

Defining Assignee Qualifications

This section discusses how to enter educational qualifications and skills.

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

The Competencies, Education (and Education USF), and Languages components are available in global assignments (Workforce Administration, Global Assignments, Assignee Qualifications) as well as in other PeopleSoft Human Resources applications.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Overview of the Hiring Process," Hiring When You Use the Manage Positions Business Process

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

Beginning an Assignment

To begin an employee's assignment:

- Create a host employment record if one does not already exist.

  Note. Use the same employment record for all assignments, entering a new data row for each assignment.

  See Chapter 5, "Tracking Assignments," Setting Up the Host Location, page 24.

- Select the Action code *ASG* (Beginning of Assignment) and any appropriate Reason code.
- Enter the host information for this assignment.

Ending an Assignment

To end an assignment insert a data row on the Home/Host Information component and select *ASC* (End of Assignment) in the Action/Reason field on the Home Host page.

End an assignment only if the employee is not being immediately sent on a new assignments.

if the employee is going on a new assignment immediately, enter a new row for the new assignment.

Transferring an Employee Permanently

Sometimes an employee on temporary assignment stays at a location permanently. As a permanent employee, he or she shares the same status as a local employee and should no longer be managed as an employee on temporary assignment. All employee, benefit, and payroll data tracking for the employee takes place at the new location because it is the employee's new home base.

To transfer an employee permanently:

1. End all open temporary global assignments.
2. Access the Job Data page, insert a row, and enter the department, location, and job code for the permanent host assignment.

See Also

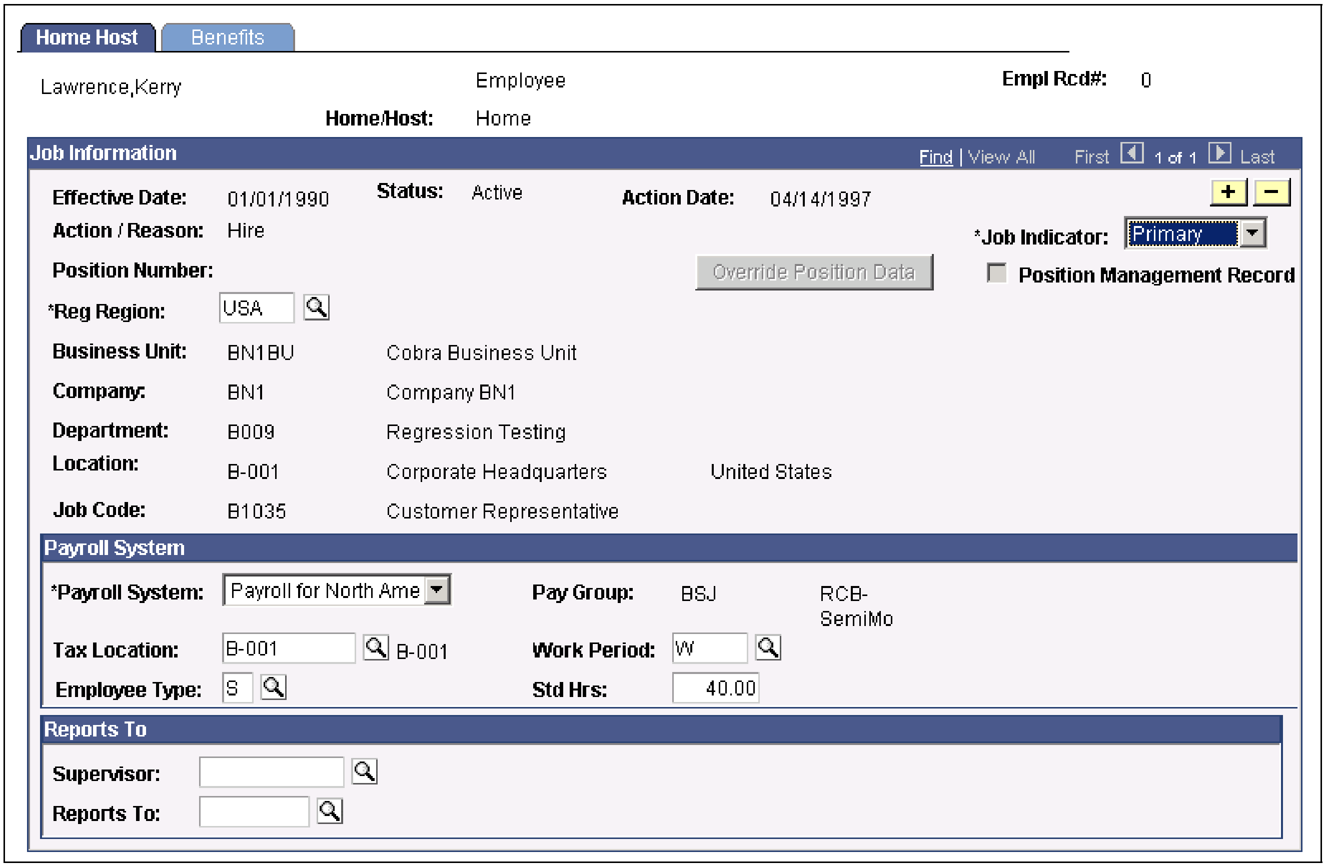
PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Updating Workforce Information," Entering Departmental Transfers

Pages Used to Manage Home and Host Data

Page Name	Object Name	Navigation	Usage
Home Host	HOME_HOST_DATA	Workforce Administration, Global Assignments, Track Assignment, Home/Host Information, Home Host	View and update home and host information. Home data comes from the employee data pages. You must have previously hired the employee and entered him or her in the Hire Employee component of the Workforce Administration menu. You must establish a host employment record to manage assignments from the Assignment Data component.
Home/Host Information - Benefits	JOB_DATA_BENPRG	Workforce Administration, Global Assignments, Track Assignment, Home/Host Information, Benefits	Add or view home and host benefits data. Home data comes from the employee data pages. You must have previously hired the employee and entered him or her in the Hire Employee component of the Workforce Administration menu.

Viewing and Updating Home and Host Information

Access the Home Host page.



Home Host page

If you have accessed the component using an employee's home employment record number, most of the elements on this page are display only, showing data from the employee's job record.

If you accessed the component using an employee's host employment record number, enter the employee's job information for the assignment here.

The elements on this page are the same as those found on the Job Data component.

Home/Host

The system populates this field with:

- *Home* if you access the page using an employee's home employment record.
- *Host* if you access the page using an employee's assignment employment record.

Action Date

Displays the date on which you entered this row.

Action/Reason

Select one of the following actions to distinguish global assignments from other administrative actions:

- *ASG*: Beginning of Assignment
- *ASC*: End of Assignment

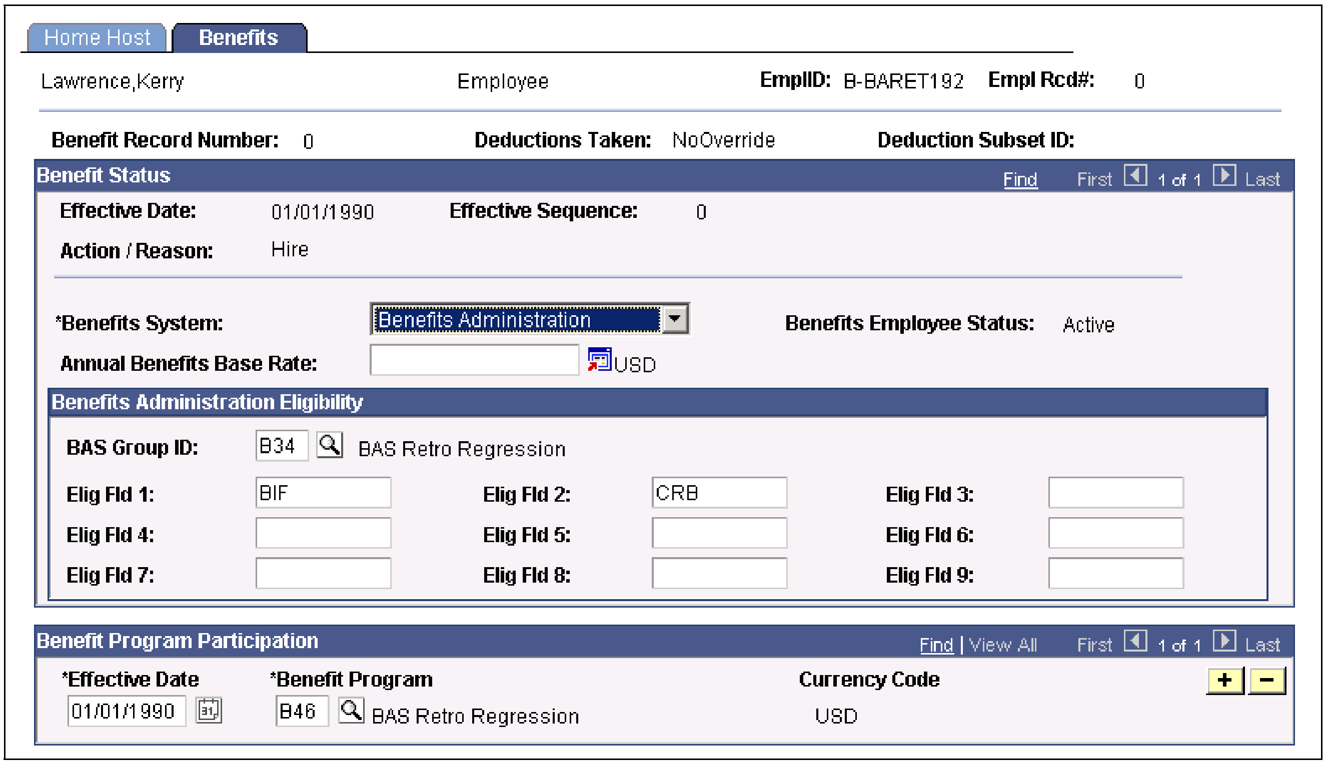
You can identify specific reasons for sending employees on assignments. For example, you might process some assignments that are due to a transfer of skills and others due to a shortage of local skilled personnel. To track assignment types more easily, specify reasons for them.

Use the Action Reason Table to set up reasons specific to global assignments.

See *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, “Setting Up the Administer Workforce Business Process”.

Adding or Viewing Home and Host Benefits Data

Access the Home/Host Information - Benefits page.



Home/Host Information - Benefits page

The elements on this page are the same as those found on the Job Data component.

Benefit Program Enter a benefit program; doing so will not affect other employee home data.

You can make changes on the Home/Host Information - Benefits page, or on the Benefit Program Participation page in the Workforce Administration menu.

See Also

PeopleSoft 8.8 Benefits Administration PeopleBook, “Setting Up Flexible Credits”

Managing Assignments With Multiple Home or Host Data Records

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

This section discusses how to:

- Add assignments when an employee has multiple jobs at home.
- Add assignments when an employee has multiple host locations.
- Tie multiple home or host data to an assignment.

Adding Assignments When an Employee Has Multiple Jobs at Home

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

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

1. Create a new host employment record on the Home/Host Information component or in the Add Concurrent Job component (Workforce Administration, Job Information, Assign Additional Job).

   The system adds another employment record so that you (and the system) can differentiate between the jobs. In both hiring and adding concurrent jobs the system uses home as the default home/host class.
2. Enter assignment dates in the Assignment Data page.

   When you enter the assignment end date, the system checks to see if other home records have effective dates equal to or before the end date that you entered. If more than one current home data record exists, the system displays a message asking you to indicate the home record for this assignment. Click OK to continue.
3. Associate one of the home records with the assignment on the Assignment Data - Assignment Home/Host page.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Hiring Your Workforce," Adding Concurrent Jobs

PeopleSoft 8.8 Human Resources PeopleBook: Manage French Public Sector, "Hiring French Public Sector Employees," Adding Concurrent Jobs

Chapter 5, "Tracking Assignments," Tying Multiple Home or Host Data to an Assignment, page 30

Adding Assignments When an Employee Has Multiple Host Locations

Some employees split their time between two or more locations during an assignment. For example, a manager who was sent to Japan might also be assigned to work in Korea at the same time. Whether this is known before the assignment starts or arises during the assignment, the jobs are treated as different, concurrent host records in the system.

To track data for an employee with multiple host records:

1. Create a separate employment record for each host on the Home/Host Information component.

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

2. Enter assignment dates and other details on the Assignment Data page, unless assignment data already exists for the first host.

   If assignment data already exists for the first host, create only one assignment for both hosts. Verify that the current assignment data has an end date that includes or extends beyond the end date of the second assignment.

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

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

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

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

Tying Multiple Home or Host Data to an Assignment

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

To associate a home record with an assignment:

1. Access the Assignment Data - Home/Host page.

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

2. Insert a new data row.

3. Select *Home* in the Home or Host field.

4. Enter or select the Empl Rcd # (employment record number) for the home record that you want to associate with this assignment.

   The system populates the remaining fields.

5. Save entries.

To associate multiple host records with an assignment:

1. Access the Assignment Data - Host/Home Data page.

   If the employee has only one host data record, it appears on this page.

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

2. Insert a new data row for each host location.
3. Select *Host 1* for the first location and *Host 2* for the second location, in the Host field.
4. Enter or select the appropriate Employment Record Number for each location. The system populates the remaining fields.

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

5. Save entries.

Managing Employee Assignment Data

Use the Assignment Data component to manage employee assignment data.

This section discusses how to:

- Enter basic assignment data.
- Enter home and host information for the assignment.
- Manage home residence information.
- Manage host residence information.
- Track home and host vehicle information.

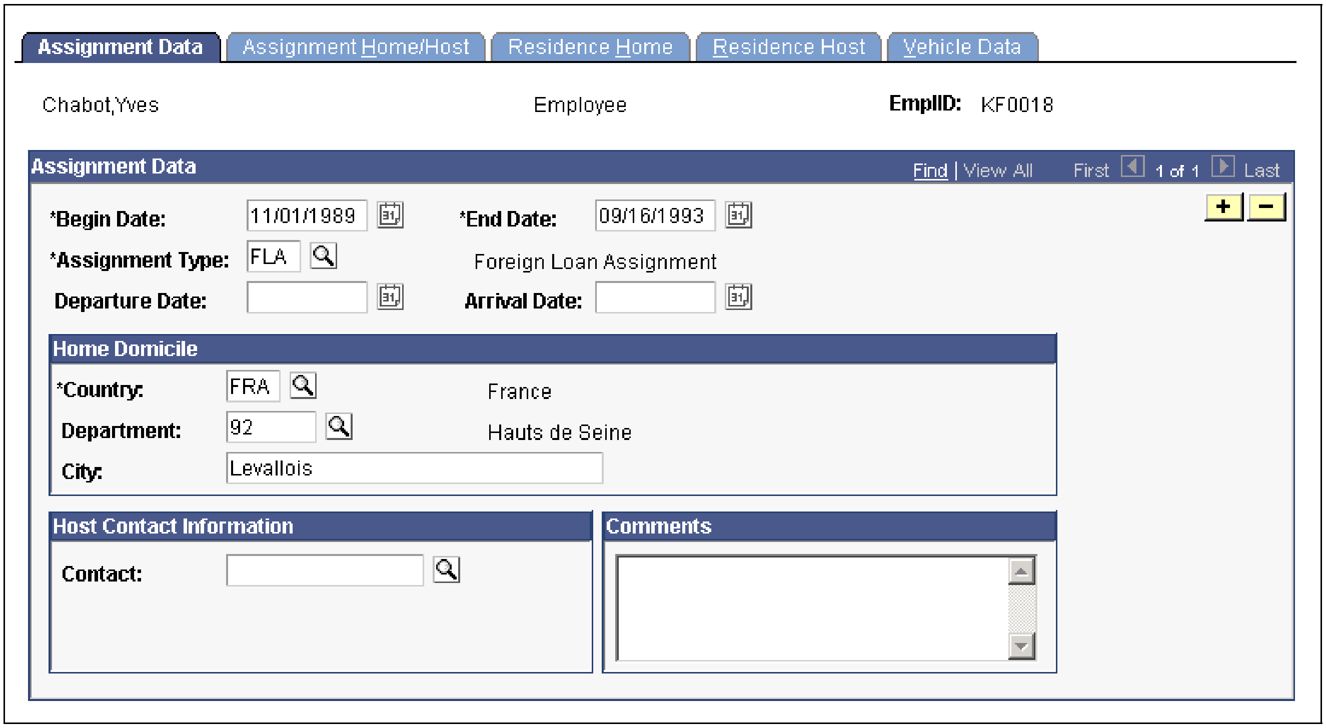
Note. PeopleSoft Human Resources also includes PeopleSoft Human Resources: Administer Company Cars to track your organization's car-specific benefits.

Pages Used to Assign an Employee to an Assignment

Page Name	Object Name	Navigation	Usage
Assignment Data	ASSIGNMENT_DATA	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Assignment Data	Enter information about assignment types.
Assignment Data - Assignment Home/Host	ASSIGNMENT_HOMHST	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Assignment Home/Host	Enter home and host information.
Assignment Data - Residence Home	RESIDENCE_HOME	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Residence Home	Enter information about home residences and furniture.
Assignment Data - Residence Host	RESIDENCE_HOST	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Residence Host	Enter information about host residences and furniture.
Assignment Data - Vehicle Data	VEHICLE_DATA	Workforce Administration, Global Assignments, Track Assignment, Assignment Data, Vehicle Data	Track the location and status of vehicles.
Assignment Summary	ASSGNMT_SUMMARY	Workforce Administration, Global Assignments, Track Assignment, Review Assignment Summary	Review a summary of an employee's assignment.
Run Control	RUNCTL_PER717	Workforce Administration, Global Assignments, Track Assignment, Employee on Assignment Report	The Employees on Assignment report (PER717) lists the employees who are on assignment.

Entering Assignment Data

Access the Assignment Data page.



Assignment Data page

Begin Date and **End Date** — Enter the assignment's begin and end dates.

Assignment Type — Select a value that was created in the Assignment Type table.

Departure Date and **Arrival Date** — Enter the employee's estimated date of departure from the home location and arrival at the new primary host.

Home Domicile

View information about the employee's home domicile.

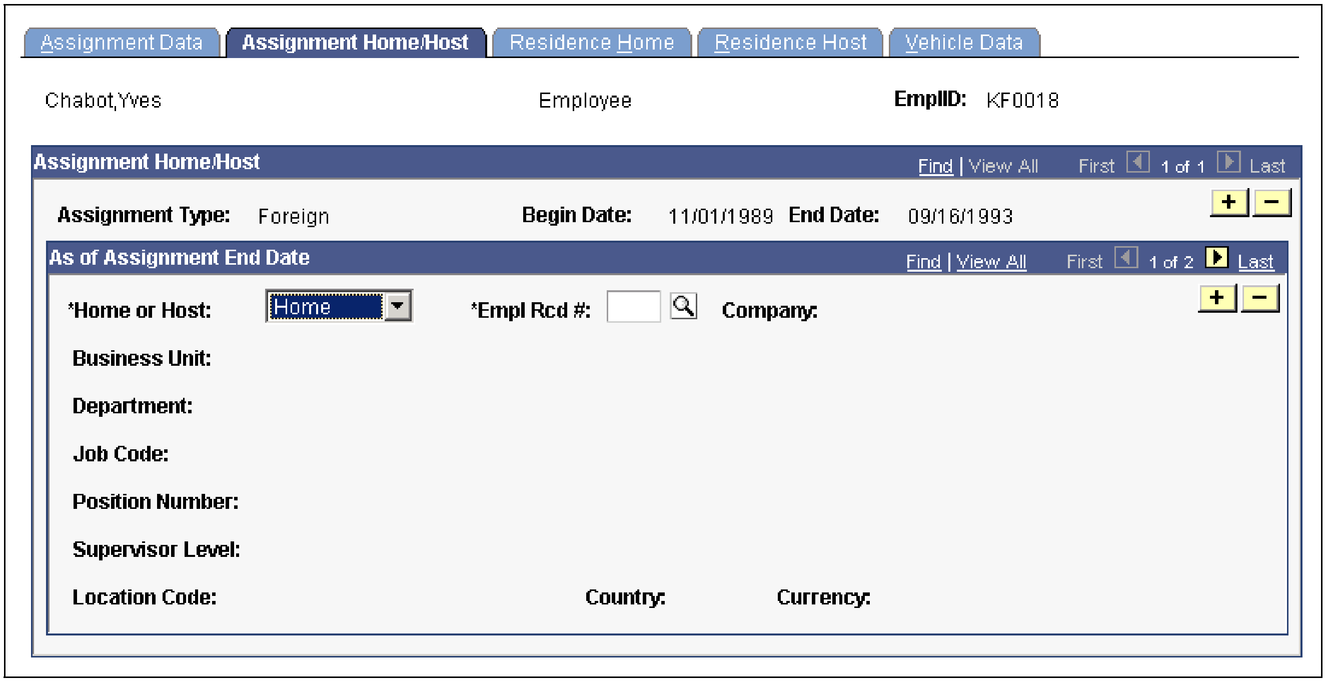
The system uses the home domicile values from the employee personal data as default values. Use this information to process home leave travel on the Company Paid Travel page.

Host Contact Information

Enter a contact in the employee's host country who can be contacted by the home supervisor in case of emergency. The employee's name and work telephone number are provided.

Entering Home and Host Information

Access the Assignment Data - Assignment Home/Host page.



Assignment Data - Assignment Home/Host page

Home or Host

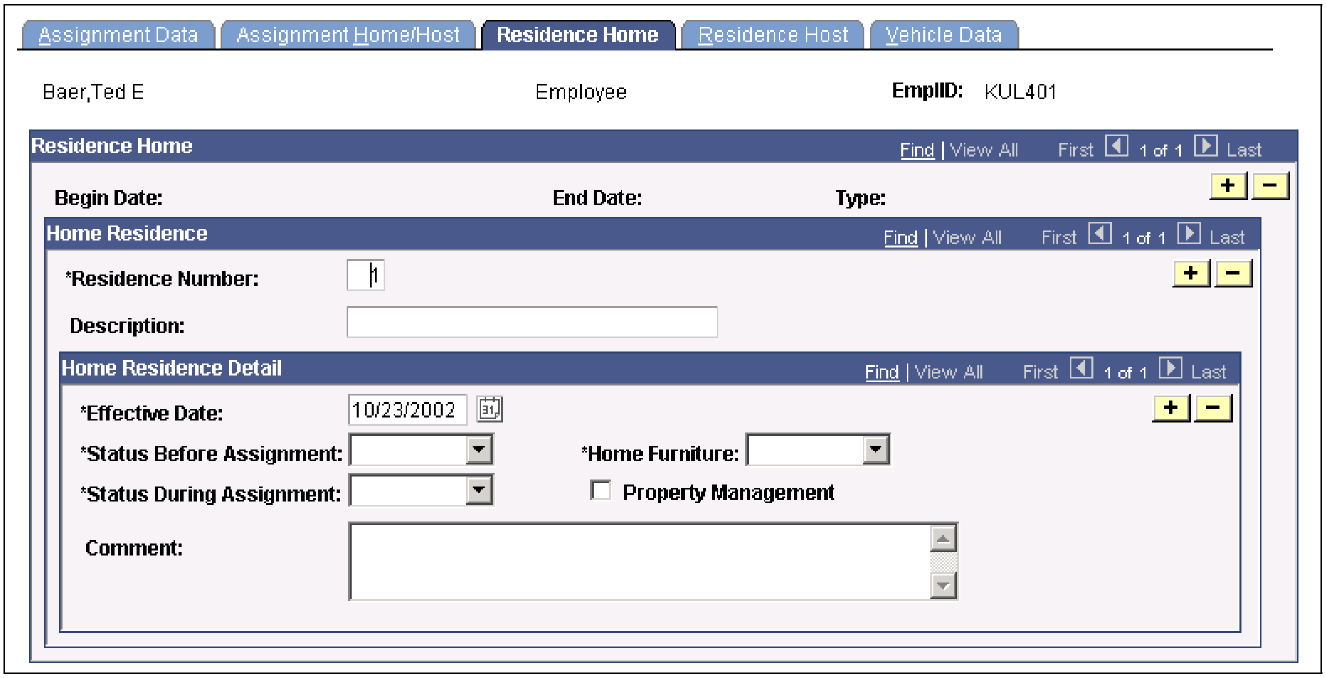
Select *Home* or the appropriate hosting location.

The system populates the rest of the elements on the page with the data associated with them on the Home/Host Information component.

Note. If the system doesn't populate the elements, it means that the home or host data takes effect after the end date that you entered on the Assignment Data page for the current assignment. To see the information here, adjust either the effective date of the home or host data, or the end date of this assignment on the Assignment Data page.

Entering Information About Home Residences and Furniture

Access the Assignment Data - Residence Home page.



Assignment Data - Residence Home page

Residence Number

Displays the default value, *1*.

Leave the default value as is, unless you are using a different numbering sequence. Each time that you insert a new data row for another residence, the system assigns the next number in the sequence, such as *2* or *3*.

Status Before Assignment and **Status During Assignment**

Select the status of the employee's residence before and during the assignment.

Home Furniture

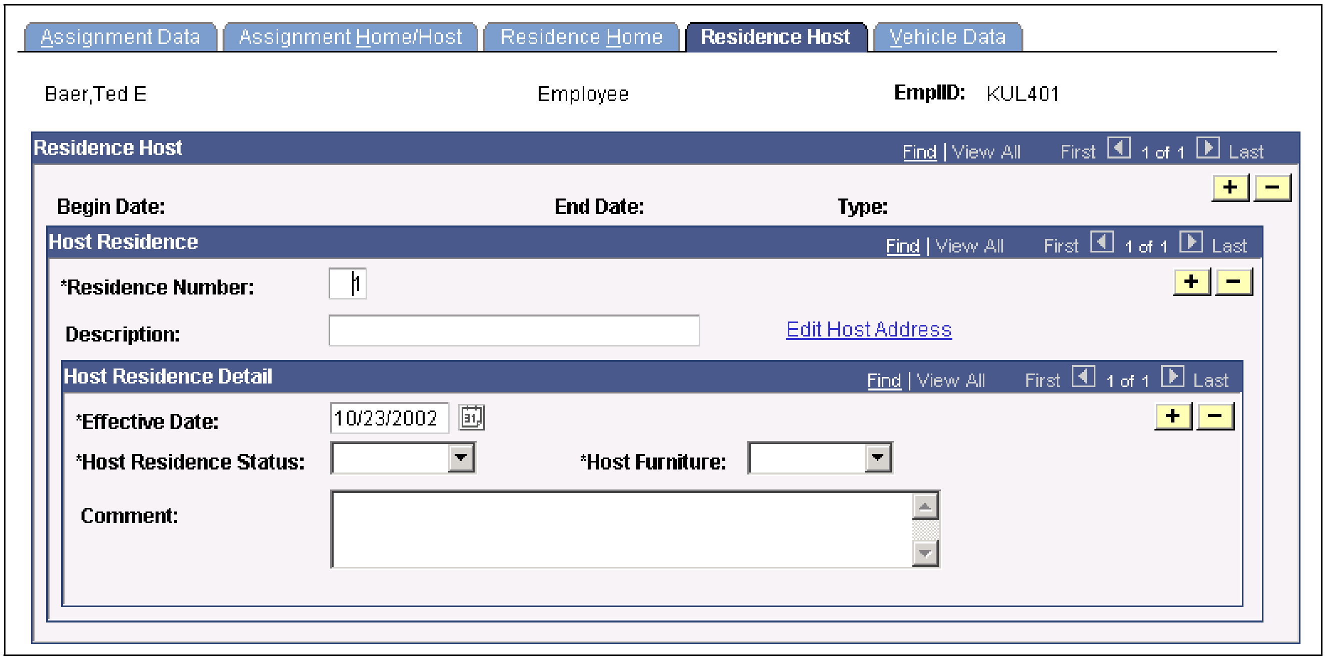
Select the disposition of the employee's home furniture that is associated with the residence.

Property Management

Select if your company is using a property management company to assist in administering residence details.

Entering Information About Host Residences and Furniture

Access the Assignment Data - Residence Host page.



Assignment Data - Residence Host page

Residence Number Displays the default value, *1*. Leave the default value as is, unless you are using a different numbering sequence. Each time that you insert a new data row for another residence, the system assigns the next number in the sequence, such as *2* or *3*.

Edit Host Address Click to edit the host residence address.

Host Residence Status Select the host residence status.

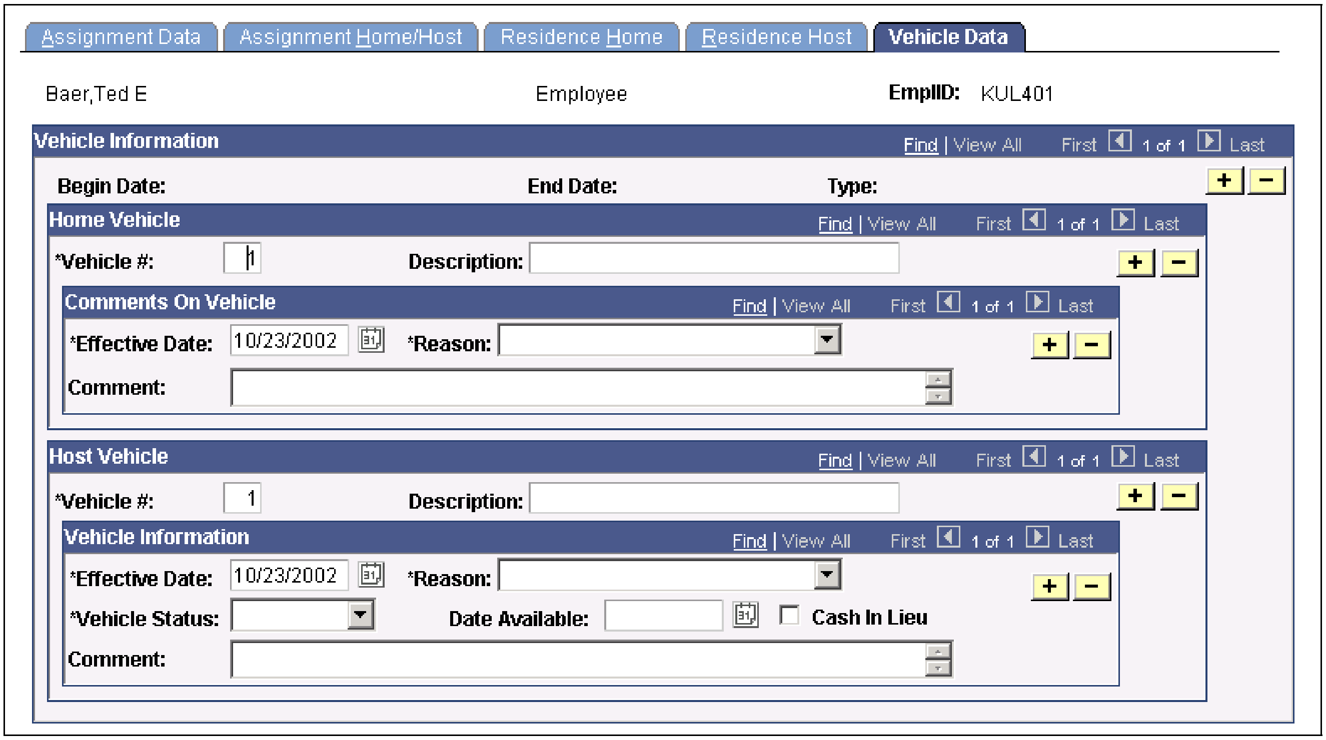
Host Furniture Select the disposition of the host furniture that is associated with the residence. Use a set of values different from those available for home residences; these values are in the Translate table.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, “Hiring Your Workforce,” Hiring an Employee

Tracking the Location and Status of Vehicles

Access the Assignment Data - Vehicle Data page.



Assignment Data - Vehicle Data page

Home Vehicle

Vehicle #: (vehicle number) — Displays the default value, *1.* Leave the default value as is, unless you are using a different numbering sequence. Each time that you insert a new data row for another vehicle, the system assigns the next number in the sequence, such as *2* or *3.*

Reason — Enter the reason or status of the employee's vehicle.

Host Vehicle

Vehicle # — Displays the default value, *1.* Leave the default value as is, unless you are using a different numbering sequence. Each time that you insert a new data row for another vehicle, the system assigns the next number in the sequence, such as *2* or *3.*

Reason — Select a reason for the status.

Vehicle Status — Select a vehicle status using a set of values different from those available for home vehicles; these values are also in the Translate table.

Date Available — Enter the date on which the vehicle is available to the employee.

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

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Company Cars, "Administering Company Cars for Your Workforce"

Managing Company Paid Travel for Employees on Assignment

This section covers how to:

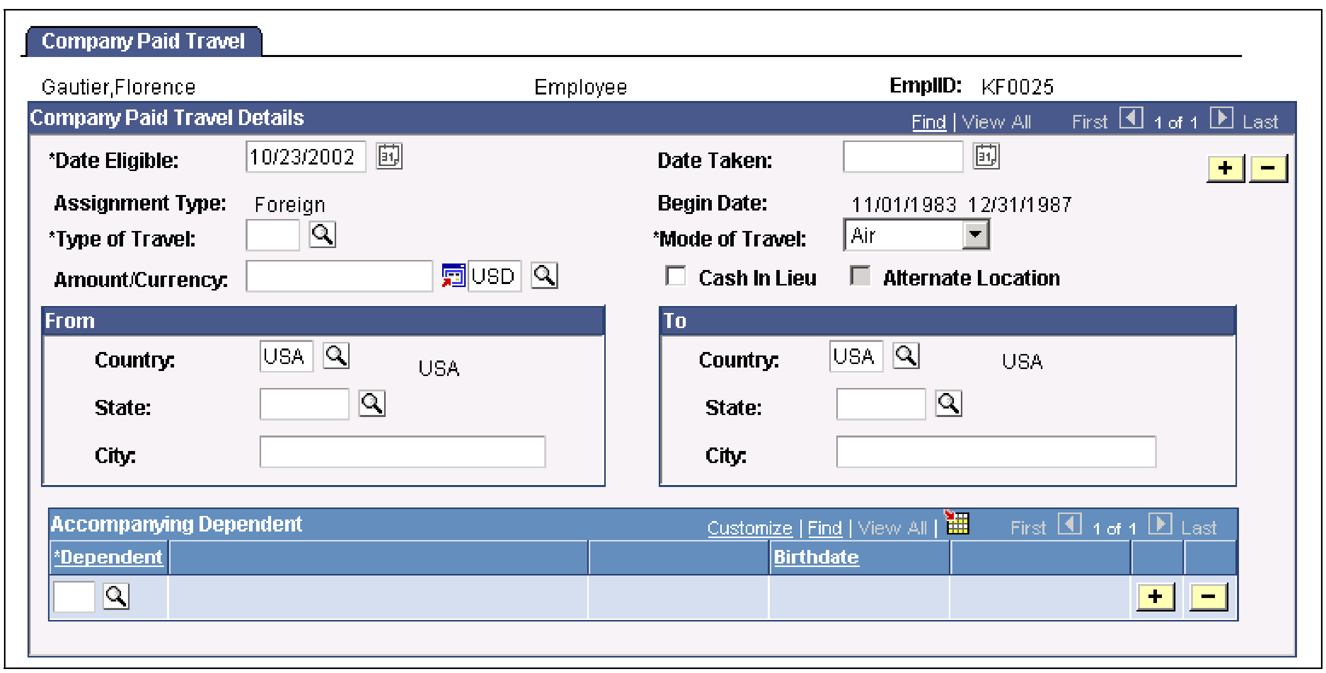
- Manage company paid travel for employees.
- Manage company paid travel for dependents.

Pages Used to Manage Company Paid Travel for Employees on Assignment

Page Name	Object Name	Navigation	Usage
Company Paid Travel	TRAVEL_CMPNY_PAID	Workforce Administration, Global Assignments, Track Assignment, Company Paid Travel	Enter company-paid travel information.
Travel Cmpny Dep (travel company dependents)	TRAVEL_CMPNY_DEP	Workforce Administration, Global Assignments, Track Assignment, Dependent Company Paid Travel	Track travel for which dependents of employees are eligible.

Entering Company-Paid Travel Information

Access the Company Paid Travel page.



Company Paid Travel page

Note. If you don't see any data in these fields, it means that the date on which the employee is eligible for travel is after the end date that is entered in Assignment Data for the current assignment. If the employee should be eligible for this travel during the assignment only, adjust either the date eligible here or the end date in Assignment Data.

Date Eligible Displays the date on which the employee is eligible for travel. Today's date appears automatically, which you can change.

Date Taken Enter the date of travel.

Type of Travel Enter one of the values that were created in the Travel Type table.

Mode of Travel Enter one of the values that were created in the Translate table. *Air* appears by default, which you can change.

Amount/Currency Enter the cost of the travel ticket or the maximum amount that the company authorizes for travel. The currency that is designated on the Installation Table - HRMS Options page appears by default, which you can change. Values are in the Currency Code table.

Cash In Lieu Select if the employee opts for cash instead of company-paid travel.

Alternate Location Select if the employee chooses to travel to a location other than his or her home domicile. If you select this check box, the To group box becomes available for alternate information entry.

Note. This check box is only available if you selected the Home Leave check box in the Travel Type table; the system displays the employee home domicile information from Assignment Date in the To group box.

Country Enter the name of the country from which the employee is traveling.

If you change the country code in either the From or To group box, the system clears the State and City fields so that you can enter new information.

Enter a new data row, to track other instances of company-paid travel.

Dependent Enter the appropriate dependent ID. To add more dependents, position your cursor in the Dependent field; click the Insert Row button.

Birthdate Displays the dependent's date of birth.

Managing Dependent Information for Employees on Assignment

Track dependent data for those dependents accompanying employees on assignment.

This section discusses how to:

- Enter and maintain basic dependent data.

- Enter and maintain data for those dependents accompanying the employee.
- Review immediate family data.

Entering Dependent Data

Enter and maintain dependent information on the Dependent Data component (Workforce Administration, Global Assignments, Track Assignment, Dependent Data).

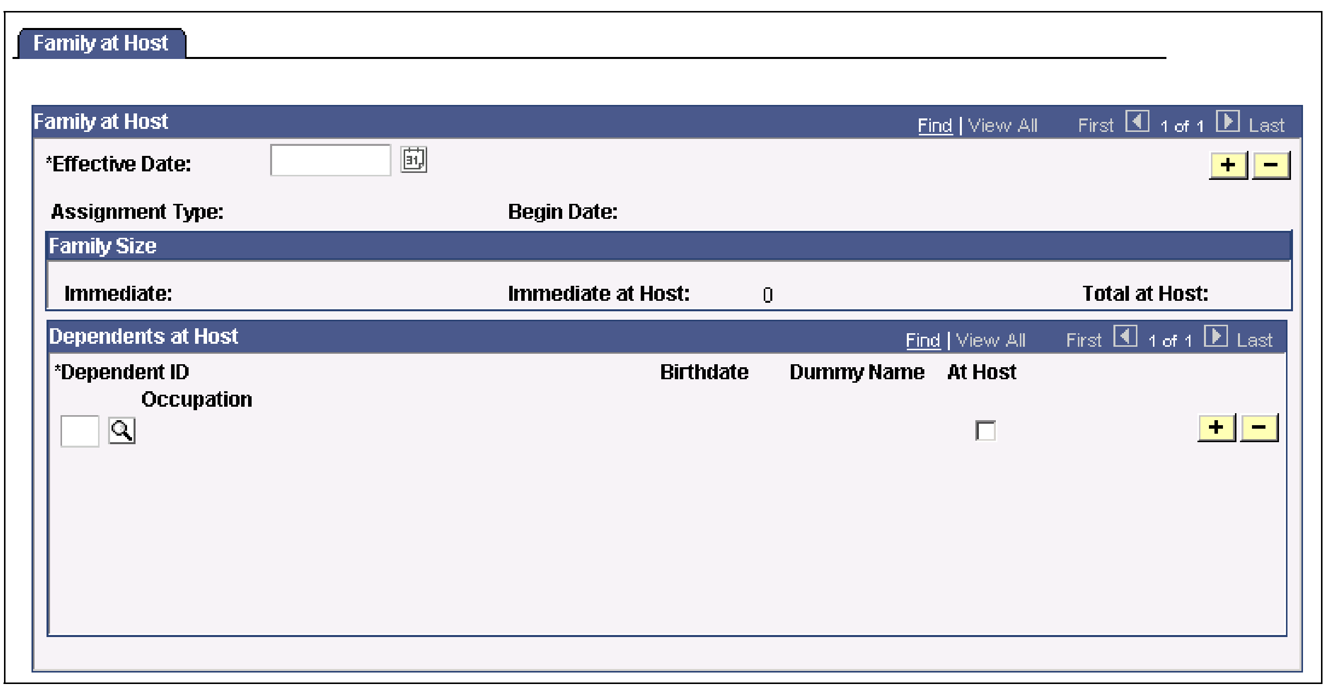
See *PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce*, "Entering Additional Data in Human Resources Records," Understanding Dependent and Beneficiary Data.

Pages Used to Manage Dependent Information for Employees on Assignment

Page Name	Object Name	Navigation	Usage
Family at Host	FAMILY_AT_HOST	Workforce Administration, Global Assignments, Track Assignment, Dependent Accompanying, Family at Host	Enter family and dependent information.
Immediate Family	IMMEDIATE_FAMILY	Workforce Administration, Global Assignments, Track Assignment, Review Immediate Family Data, Immediate Family	View information on an employee's immediate family.

Entering Information for Accompanying Dependents

Access the Family at Host page.



Family at Host page

Assignment Type, Begin Date and **End Date**
Displays the assignment type, begin date, and end date of the assignment based on the effective date.

If these fields are not populated, it means that the information that you enter takes effect after the end date that was entered in Assignment Data. To see assignment data, adjust either the effective date here or the end date in Assignment Data.

Family Size
Displays the size of the immediate family, which is defined as dependents who are the employee's spouse, son, or daughter.

Dependent ID
Displays information on all dependents who were added by using the Dependent Data pages.

At Host
Displays the number of dependents who are accompanying the employee to the host location. The system automatically selects each dependent who is an immediate family member. Clear the At Host check box for any dependents who are not accompanying the employee to the host location.

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

As you make changes to at host information, the system calculates and displays the number for immediate at host and the number for total at host, which includes any non-family members accompanying the employee.

Adding Dependents to the Host Location

To add another dependent to the Family at Host page, first add the new dependent using the Dependent/Beneficiary pages. Position your cursor in the Effective Date field. When you enter the effective date of the change, and tab out of this field, the system refreshes the dependent list.

Removing Dependents From the Host Location

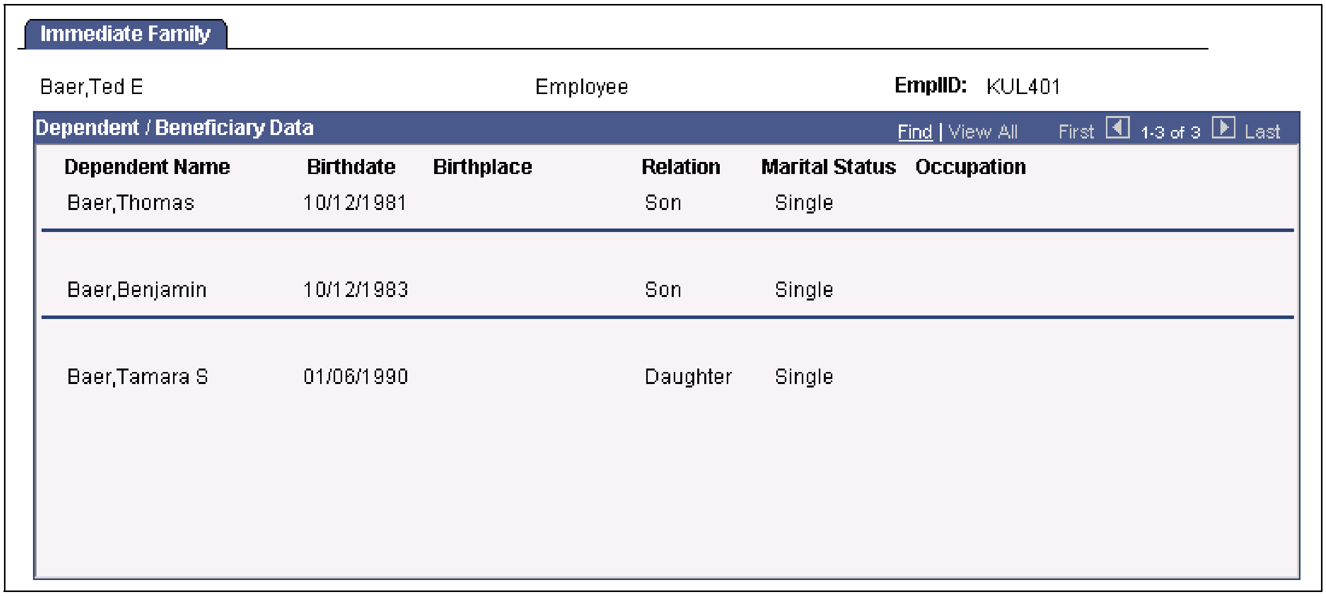
Access the Family at Host Page. To reduce the number of dependents at host, click the Delete Row Button and save your changes. The deleted dependents will be removed from the list of dependents at Host but will still be tracked in the system as dependent or beneficiaries for the given employee.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Tracking Dependent and Beneficiary Data

Viewing Information on an Employee's Immediate Family

Access the Immediate Family page.


Immediate Family

Baer,Ted E Employee EmplID: KUL401

Dependent / Beneficiary Data Find | View All First 1-3 of 3 Last

Dependent Name	Birthdate	Birthplace	Relation	Marital Status	Occupation
Baer,Thomas	10/12/1981		Son	Single	
Baer,Benjamin	10/12/1983		Son	Single	
Baer,Tamara S	01/06/1990		Daughter	Single	

Immediate Family page

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

Tracking Assignment Compensation and Currency Fluctuation

This section discusses how to track assignment compensation using the Assignment Compensation page.

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

See Also

Chapter 4, "Setting Up Global Assignments," page 9

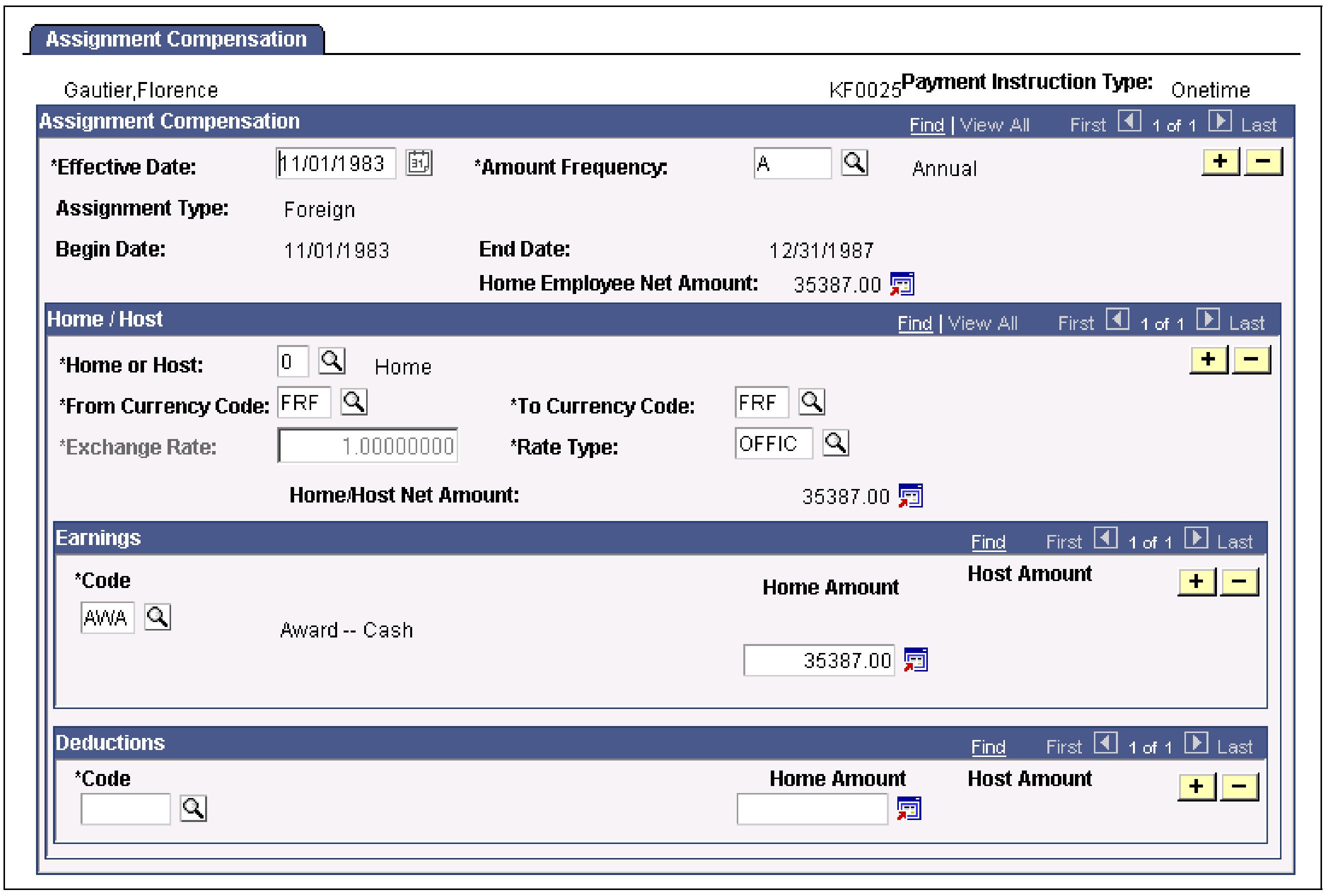
PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Working With Currencies"

Page Used to Track Assignment Compensation

Page Name	Object Name	Navigation	Usage
Assignment Compensation	ASSGNMT_EARNS_DED	Workforce Administration, Global Assignments, Track Assignment, Assignment Compensation	Enter supplemental earnings and deductions that the home location pays, such as hardship premiums and relocation costs, or that an employee receives from the host location, such as foreign housing or rent.

Tracking Assignment Compensation

Access the Assignment Compensation page.



Assignment Compensation page

Amount Frequency Enter the amount of compensation frequency from the values in the Frequency table. Options are: *Annual, Hourly,* or *Monthly.* All the amounts that you specify for both earnings and deductions must be for the frequency that you select in this field.

Assignment Type Displays the assignment type, which is based on the effective date that was entered in this page. If no information appears, it means that the information that you enter takes effect after the end date that you entered in Assignment Data; a warning message appears.

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

Home or Host Enter the employee record numbers that correspond to the home or host records. Generally, enter *0* for the home record and *1* for the host record.

From Currency Code and **To Currency Code** If assignment data exists, view the currency for the country that was designated in the employee's home data, in the From Currency Code field. View the home currency in the To Currency Code field. The system automatically populates these fields. Override these default values by selecting another currency code from the Currency Code table.

Exchange Rate Displays the exchange rate type; the rate that is specified in the Installation table appears by default.

Rate Type Displays the rate type; the rate type that is specified in the Installation table appears by default. You can override this default value.

Code Enter a code that denotes additional earnings that are charged to the home location. Create these codes in the Earnings table.

Base Compensation Displays the amount that the employee earns at the home location, which you specified in Job Data Compensation.

Home Amount Enter the home amount. Because you are entering information about home data, the Host Amount field doesn't appear.

Base Compensation Displays the amount that the employee earns at the home location, which you specified in Job Data 2.

Code Enter a code from the Deductions table that denotes deductions that should be taken from the employee compensation that you specified for the home location.

Home Amount Enter the home amount for the deduction code.

The net earnings and deductions that were specified for the home location appear. The Home/Host Net Amount displays the net amount of all supplemental earnings and deductions for both home and host. Both amounts appear in the home currency.

Because you are entering information related to home data, the Host Amount field doesn't appear.

See Also

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

CHAPTER 6

Managing Educational Allowances

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

This section discusses:

- Tracking international school and program allowances for employees.
- Tracking international school and program allowances for dependents.

Managing International Schools and Programs Allowances

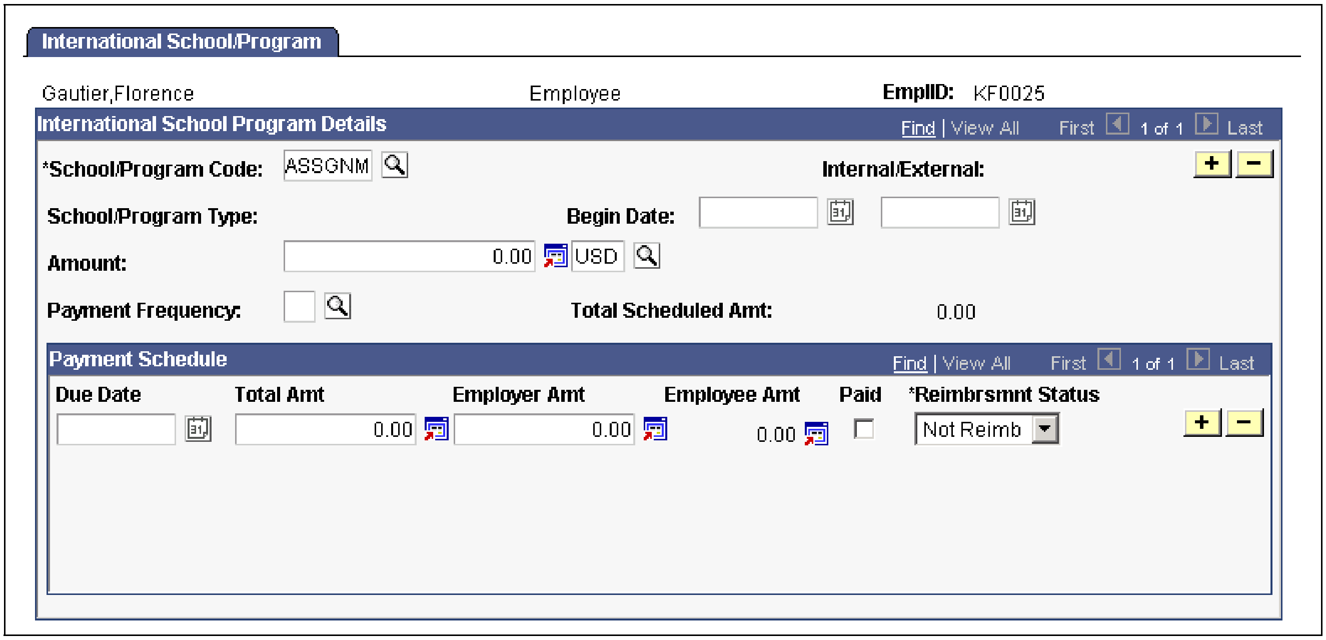
Use the International School/Program and Intl School Dep pages to track educational allowances for your employees and their dependents.

Pages Used to Manage Educational Data

Page Name	Object Name	Navigation	Usage
International School/Program	INTL_SCHOOL_PROGRM	Workforce Administration, Global Assignments, Education Allowances, International School/Program	Enter payment information.
Intl School Dep (international school dependents)	INTL_SCHOOL_DEP	Workforce Administration, Global Assignments, Educational Allowances, Dependent International School	Track beginning and end dates. Set up payment schedules for reimbursement in the designated currency.

Entering Payment Information

Access the International School/Program page.



International School/Program page

School/Program Code	Enter a school/program code. When you complete this field, the system displays the school/program type and indicates whether the school is internal or external. Create this information in the International School/Program table.
Begin Date	Enter the period during which the employee attends the school or program.
Amount	Complete this field only if you pay in a lump sum; enter the total amount. If you set up a payment schedule, leave this field blank. Once you create the schedule, the system calculates and sets the amount to the total scheduled amount. The currency appears by default as the base currency that was designated on the Installation Table - HRMS Options page, which you can change. Currency codes are in the Currency Code table.
Payment Frequency	Enter a payment frequency, if you set up a payment schedule. Values are in the Translate table.
Total Scheduled Amt (total scheduled amount)	Displays the total that the system calculates as you enter the payment schedule. Save the information entered on the page; the system sets the amount to the total scheduled amount.
Payment Schedule	To add more payments, position your cursor in the Payment Schedule group box and click the Insert Row button.
Due Date	Enter the due date for each payment that is due.
Total Amt (total amount)	Enter the total amount of each payment.
Employer Amt (employer amount)	Enter the amount that the company pays.

Employee Amt (employee amount)	Displays the amount that the employee pays. If the total and employer amounts are different, when you complete the Employer Amt field, the system calculates and displays the employee amount.
Paid	Select when you've paid the total amount to the provider of the school or program.
Reimbursmnt Status (reimbursement status)	Select the status that reflects your organization's reimbursement policy for this particular payment. After you reimburse the employee, change the status to *Reimbursed.* If the amount that the employee paid can't be reimbursed, select *Unreimb* (unreimbursable).

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.

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