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PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Training

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PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Training
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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your PeopleBooks Library. You'll find a variety of useful and timely materials, including updates to the full line of PeopleSoft Enterprise documentation that is delivered on your PeopleBooks CD-ROM.

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

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Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system 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 Enterprise 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 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 the W key.
`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.
. . . (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 (|).

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Typographical Convention or Visual Cue	Description
[ ] (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.

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 Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!,* the note 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.

Cross-References

PeopleBooks provide cross-references either under 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.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

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Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in 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.

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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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

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PeopleSoft Enterprise Human Resources Administer Training Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS application fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Administer Training.

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook

PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook.

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Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
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 documentation 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.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) 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.

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Chapters	Description
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.
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.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. **Note.** Not all applications have delivered workflows.
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.

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CHAPTER 1

Getting Started with Administer Training

This chapter provides an overview of Administer Training and discusses:

- Administer Training business processes.
- Administer Training integrations.
- Administer Training implementation.

Administer Training Overview

Administer Training supports your company's training needs.

With this application, you can:

- Establish the company training architecture.
- Manually enroll employees into the training program.
- Track course information for all students, including employees, temporary workers, and customers.
- Track the demand for training in an enterprise at the department or employee level.

Administer Training Business Processes

Administer Training supports the following business processes:

- Setting up training programs and courses.

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

- (Optional) Setting up training costs.

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

- (Optional) Setting up training requirements.

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

- (Optional) Planning training budgets and run scenarios.

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

- Administering course sessions.

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

- Enrolling or waitlisting students.

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

- Tracking student training.

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

- (Optional) Tracking student training costs.

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

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

Administer Training Integrations

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

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

We cover integration considerations in this PeopleBook.

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

Administer Training Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

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See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

PeopleSoft Enterprise Components for PeopleSoft Enterprise HRMS and Campus Solutions 9.0 PeopleBook

PeopleTools PeopleBook: PeopleSoft Setup Manager

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CHAPTER 2

Defining Training Courses and Programs

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

- Set up vendors and vendor contacts.
- Set up training equipment, materials, and facilities.
- Set up instructors.
- Define course categories.
- Set up courses.
- Organize the course catalog.
- Set up training programs.
- Set up noncourse training.
- (MEX) Create training and development plans.
- Run training course and training program reports.

Understanding Course and Program Setup

This section lists prerequisites and discusses:

- Training courses
- Training programs

Training Courses

Courses are the foundation of in-house course session administration. To set up courses:

1. Define training resources.

   Enter information about the vendors, instructors, training facilities, equipment, and materials that are needed for course delivery.

2. Define course categories and subcategories.

   Categories and subcategories help organize courses by topic so that users can find them easily in the training catalog.

3. Define courses.

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For each course, define general information , such as the duration, primary delivery method, and whether the course is internal or external. Also identify course prerequisites, instructor competencies and target competencies for the course (if you're using the Manage Profiles business process), equipment and materials, and the course category and subcategory.

4. Organize the course catalog, as needed.

Training Programs

After you define courses, you can create training programs. You specify the courses within the program, the sequence in which the courses are to be taken, and which are required.

Prerequisites

When you set up training courses, you can specify competencies, accomplishments, education, and skills that are required to teach a course or that are assigned to students after successful completion of the course. To do this, you need to set up your content catalog provided in the Human Resources: Manage Profiles business process.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"

Setting Up Vendors and Vendor Contacts

To set up vendors and vendor contacts, use the Vendors (TRN_VENDOR_TABLE1) and the Vendor Contacts (TRN_VNDR_CNTCT_TB1) components.

You'll probably outsource some of the services that you use to run training course sessions. For example, you might use caterers to provide meals for attendees or hotel conference rooms to hold some courses. In the Vendors component, you enter information about the vendors that you use frequently.

Note. (FRA) Use the Vendors component to set up finance fund providers for 2483 reporting in France.

This section discusses how to:

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

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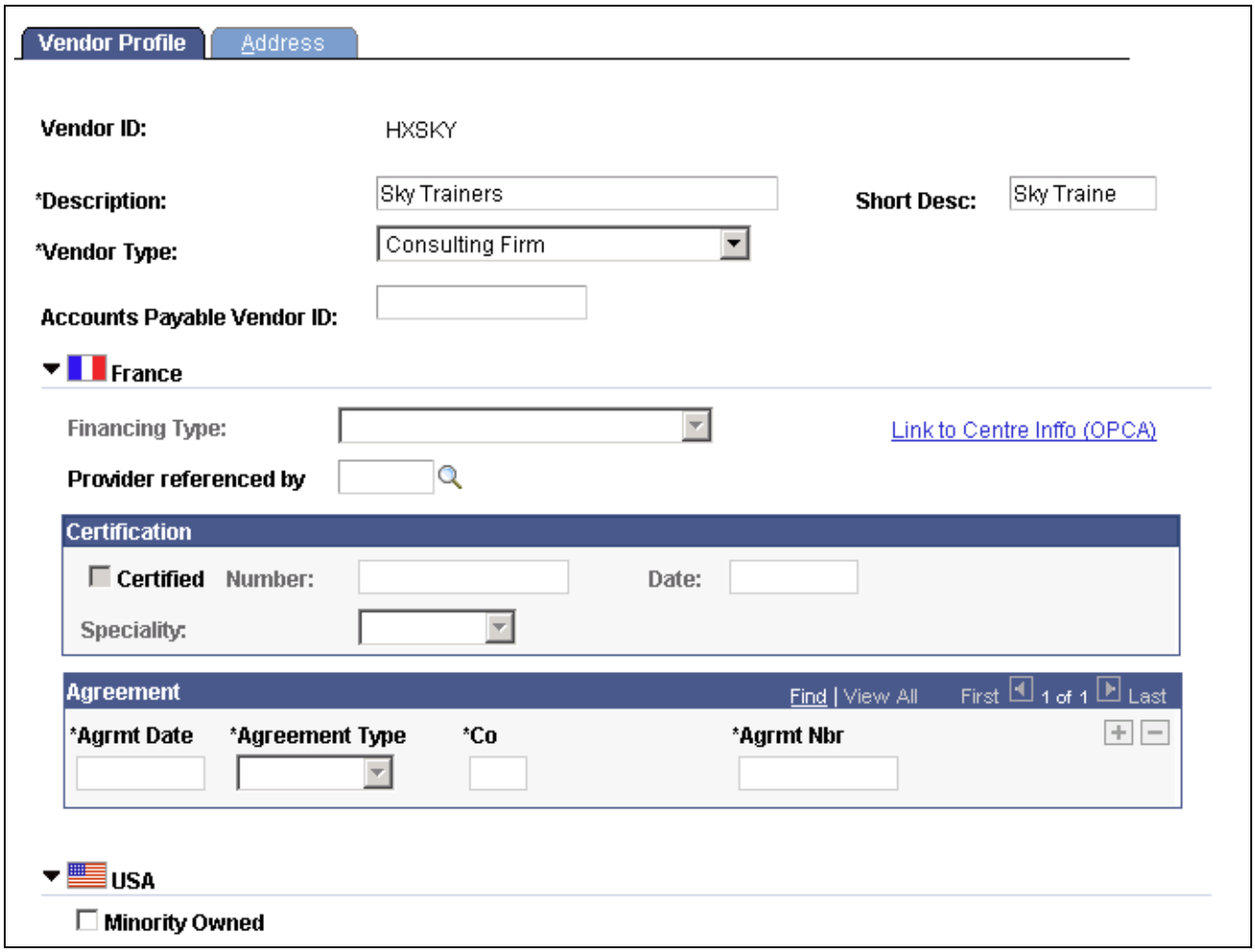
Pages Used to Set Up Vendors and Vendor Contacts

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

Entering Basic Vendor Information

Access the Vendor Profile page.

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Vendor Profile page

Vendor Type Select the type of services provided by the vendor: *Consulting Firm, Equipment Rental, Facilities Rentals, Financing Fund, Guest Speaker, Other, Outside Instructors, Training Materials,* or *Training Provider.*

Note. (FRA) The *Consulting Firm, Training Provider,* and *Financing Fund* values activate the France section of the page. Select *Consulting Firm* to designate that the vendor provides competency checks. Select *Training Provider* to designate that the vendor delivers training. Select *Financing Fund* when the vendor represents a financing organization to which you contribute funds for training.

(FRA) France

This section is activated only when the selected vendor type is *Consulting Firm, Training Provider,* or *Financing Fund.*

Financing Type When the vendor type is *Financing Fund*, identify the type of fund the vendor finances:

Select *Financing Training Leave Fund* if the fund pertains to individual training leave (*Congé Individuel de Formation* or *CIF*). Select *Financing Fund*

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	if the fund is not used for individual training leave. Your selection determines the section (Group L, indicator 5 or Group L, indicator 11) of the 2483 report, under which training funded by this vendor are reported.
Provider Referenced By	This field is available only when the vendor type is *Consulting Firm* or *Training Provider.* Select the organization that provides funding for competency checks. Funding organizations are delivered as system data in the Vendor table (PS_TRN_VENDOR_TBL).
Link to Centre Inffo (OPCA)	Click this link to access the website that lists the names and addresses of the fund collecting organizations *(Organismes paritaires collecteurs agréés (OPCA).*

(FRA) Certification

If the vendor type is *Training Provider,* enter the provider's certification details in this group box

Certified, Number, and **Date**	Select if the government certifies the provider, and enter the certification number and date.
Specialty	Select the provider's area of expertise.

(FRA) Agreement

For each training provider, record all agreements that have been reached with your organization. This information is needed to meet French legal reporting requirements. Add a row for each agreement.

Agrmt Date (agreement date)	Enter the date of the agreement between your organization and the training provider.
Agreement Type	Select the type of agreement: *Simple, Annual,* or *Multi-ann* (multiannual).
Co (company)	Select the provider name from the vendors that you defined in the Vendor table.
Agrmt Nbr (agreement number)	Enter the number of the agreement between your organization and the training provider.

(USA) USA

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

See Also

Chapter 12, "(FRA) Producing the French Training Report 2483," page 221

Entering Vendor Addresses and Cost Information

Access the Vendors - Address page.

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Vendors - Address page

Training Cost Estimation

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

Cost Unit Select the unit for the vendor cost.

See Also

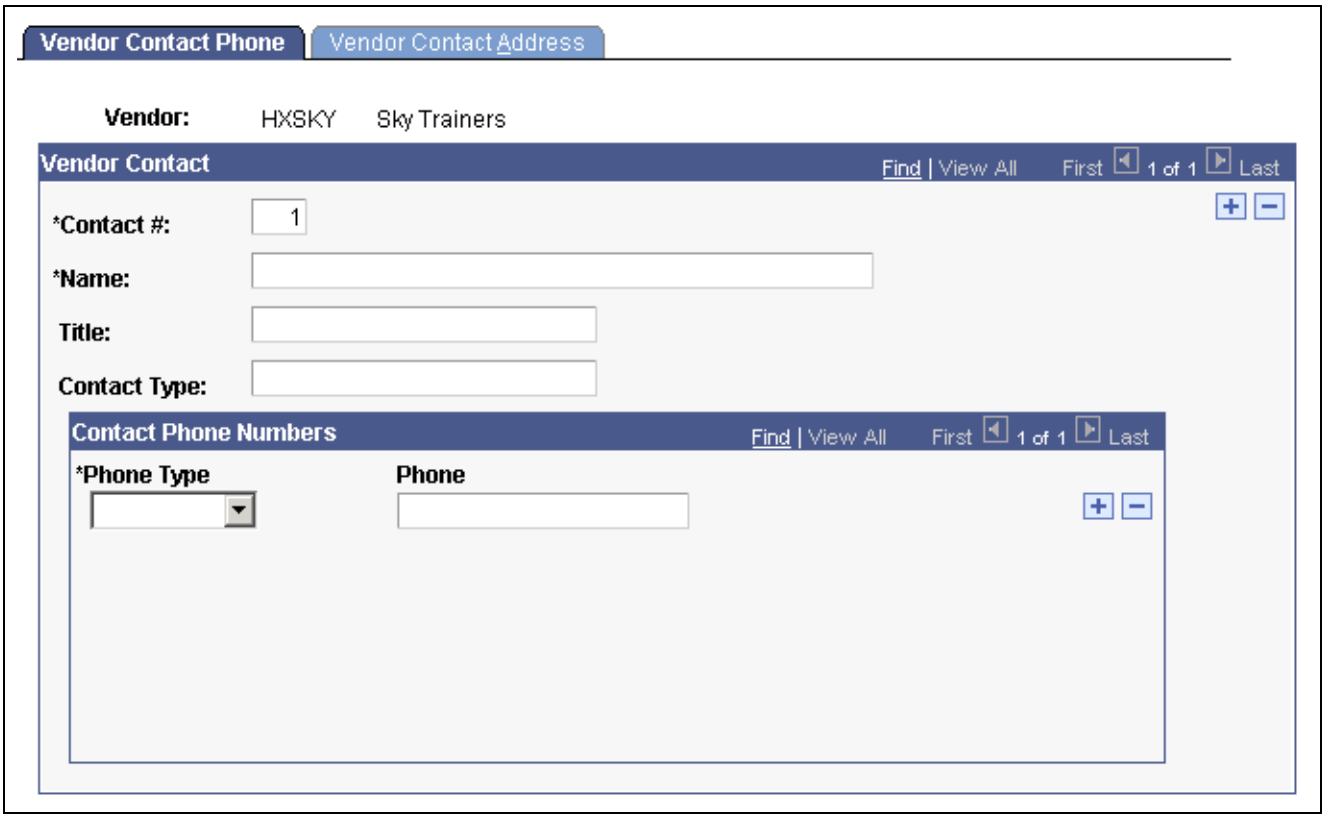
Chapter 9, “Tracking Training Costs,” Understanding Training Cost Tracking, page 177

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Installing PeopleSoft HRMS,” Understanding Country Codes

Entering Vendor Contact Details

Access the Vendor Contact Phone page.

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Vendor Contact Phone page

Vendor Contact

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

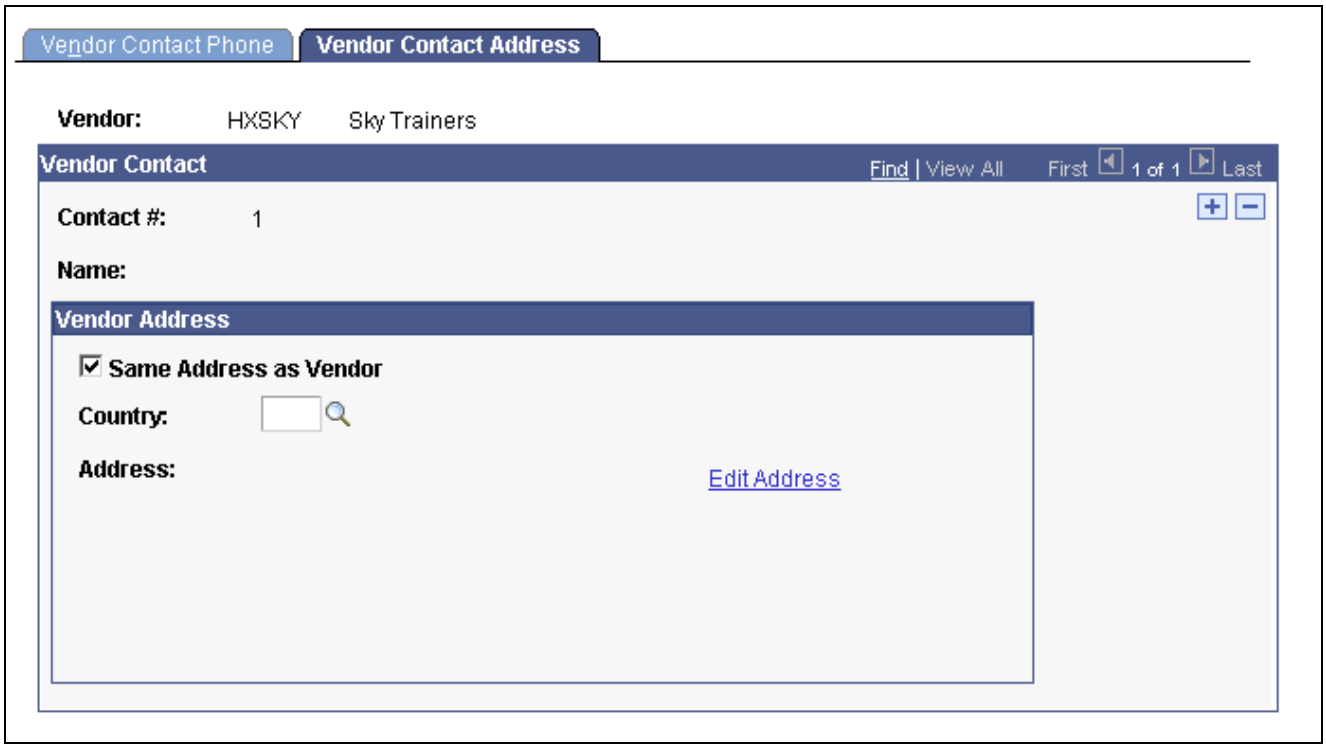
Contact Phone Numbers

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

Entering Vendor Contact Addresses

Access the Vendor Contact Address page.

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Vendor Contact Address page

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

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

Setting Up Training Equipment, Materials, and Facilities

To set up training equipment, materials, and facilities, use the Equipment and Materials (TRN_EQUIP_TABLE) and the Training Facilities (TRN_FACILITY_TBL) components.

This section discusses how to:

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

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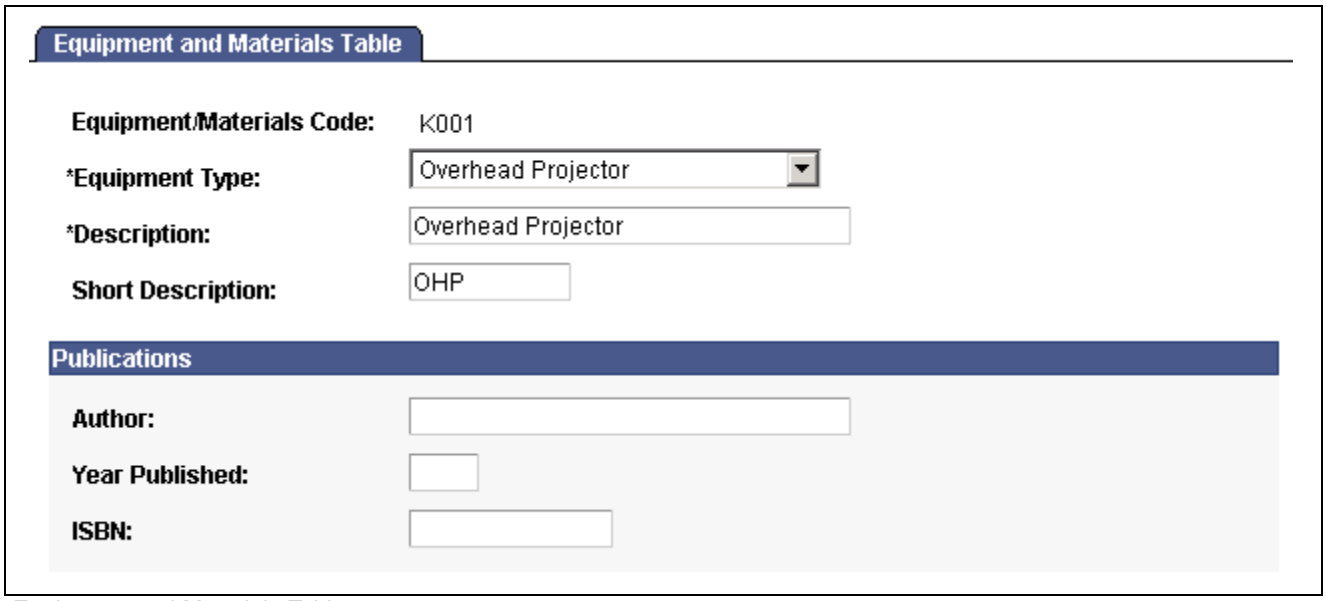
Pages Used to Set Up Training Equipment, Materials, and Facilities

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

Identifying Equipment and Materials

Access the Equipment and Materials Table page.

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Equipment and Materials Table page

Equipment Type Select from the available options.

Publications

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

Entering Training Facility Addresses

Access the Training Facilities - Address page.



Training Facilities - Address page

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

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

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Location Code

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

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

If the training facility is offsite, leave this field blank.

Facility Name

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

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

Mail Drop ID

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

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

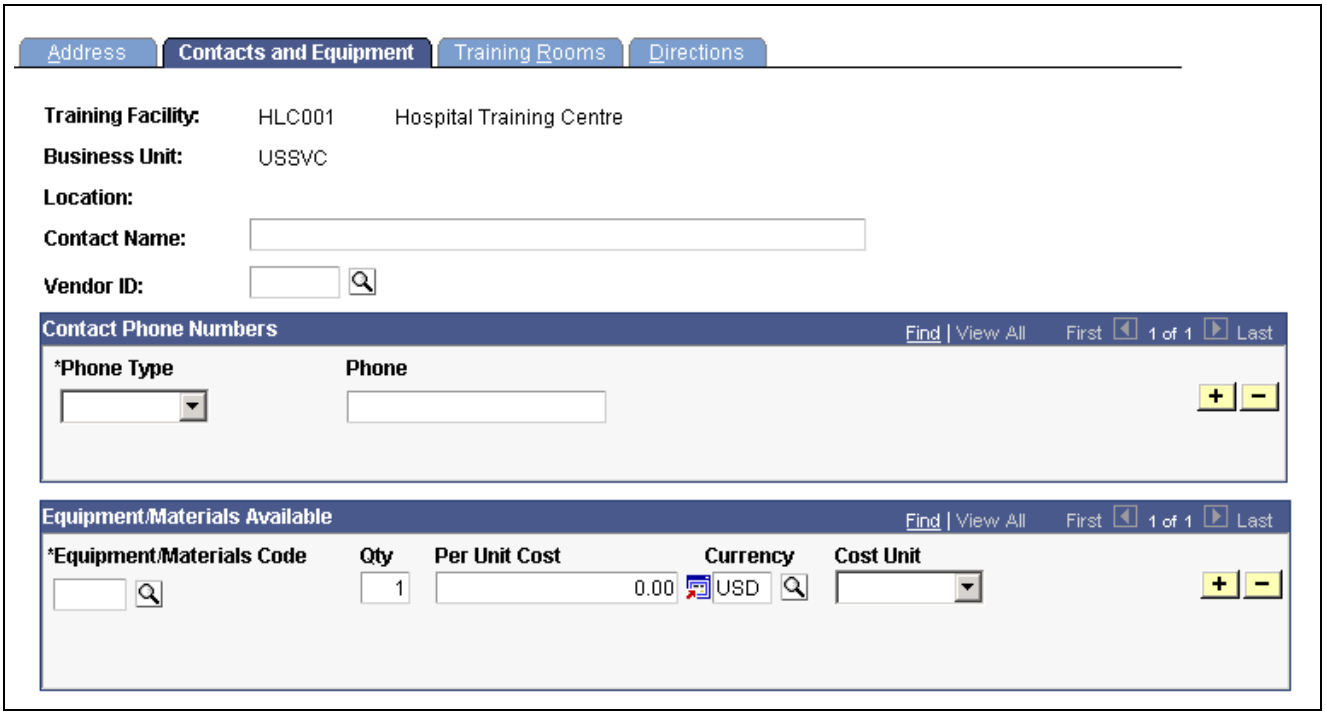
Country

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

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

Entering Contact and Equipment Information

Access the Contacts and Equipment page.



Contacts and Equipment page

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

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Contact Name Enter a contact name for the training facility. This field is required to generate the Equipment Checklist report (TRN034).

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

Contact Phone Numbers

Phone Type and **Phone** Select a phone type and enter the number. These fields are required to generate the Equipment Checklist report (TRN034).

Equipment/Materials Available

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

Equipment/Materials Code The system displays the name of the selected equipment.

Qty (quantity) Enter the quantity of each piece of equipment that is available at the training facility.

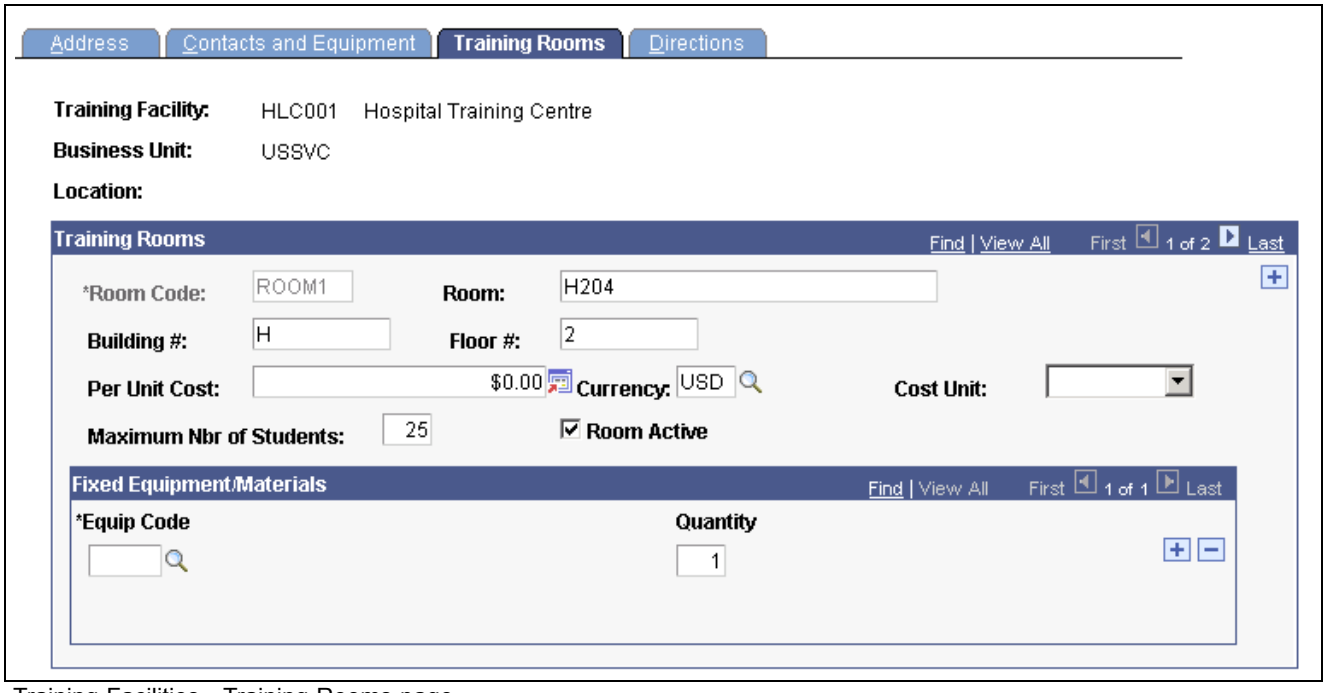
Per Unit Cost Enter a per unit cost for each item. This field is optional, but it's helpful as a reference, especially for comparing facility site costs.

In the field next to per unit cost, select the currency code for the item. The default currency code is from the value that is specified in the EXCHNG_TO_CURRENCY field in the BUS_UNIT_OPT_HR record. You can override this value.

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

Tracking Training Room Information

Access the Training Facilities - Training Rooms page.



Training Facilities - Training Rooms page

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

Training Rooms

Room Code	Each room in a training facility must have a unique room code.
Building # and **Floor #** (building number and floor number)	Enter the room name, the name or number of the building in which the room is located, and the floor number.
Per Unit Cost	Enter a per unit cost for the room.
Cost Unit	Select the cost unit that is associated with the per unit cost.
Maximum Nbr of Students (maximum number of students)	Enter the maximum number of students that can be accommodated in the room. When you set up a course session, the system checks this field to determine whether the room is large enough for the selected course.
Room Active	Clear this check box if the training room isn't available for training. You can schedule sessions in a room only if Room Active is selected.

Fixed Equipment/Materials

Equip Code and **Quantity** (equipment code and quantity)	Select a code for each item in the training room and the number of each item. Include only fixed equipment that is tied to the room. The system displays the item's name.

Entering Training Facility Directions

Access the Training Facilities - Directions page.

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Training Facilities - Directions page

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

See Also

Chapter 7, “Enrolling and Wait-Listing Students,” Producing Training Letters, page 140

Setting Up Instructors

To set up profiles for internal and external instructors, use the Instructors (TRN_INSTRUCTR_TBL1) component.

Instructor profiles help you track instructor costs and areas of expertise; and choose the most qualified instructor for a course.

This section discusses how to:

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

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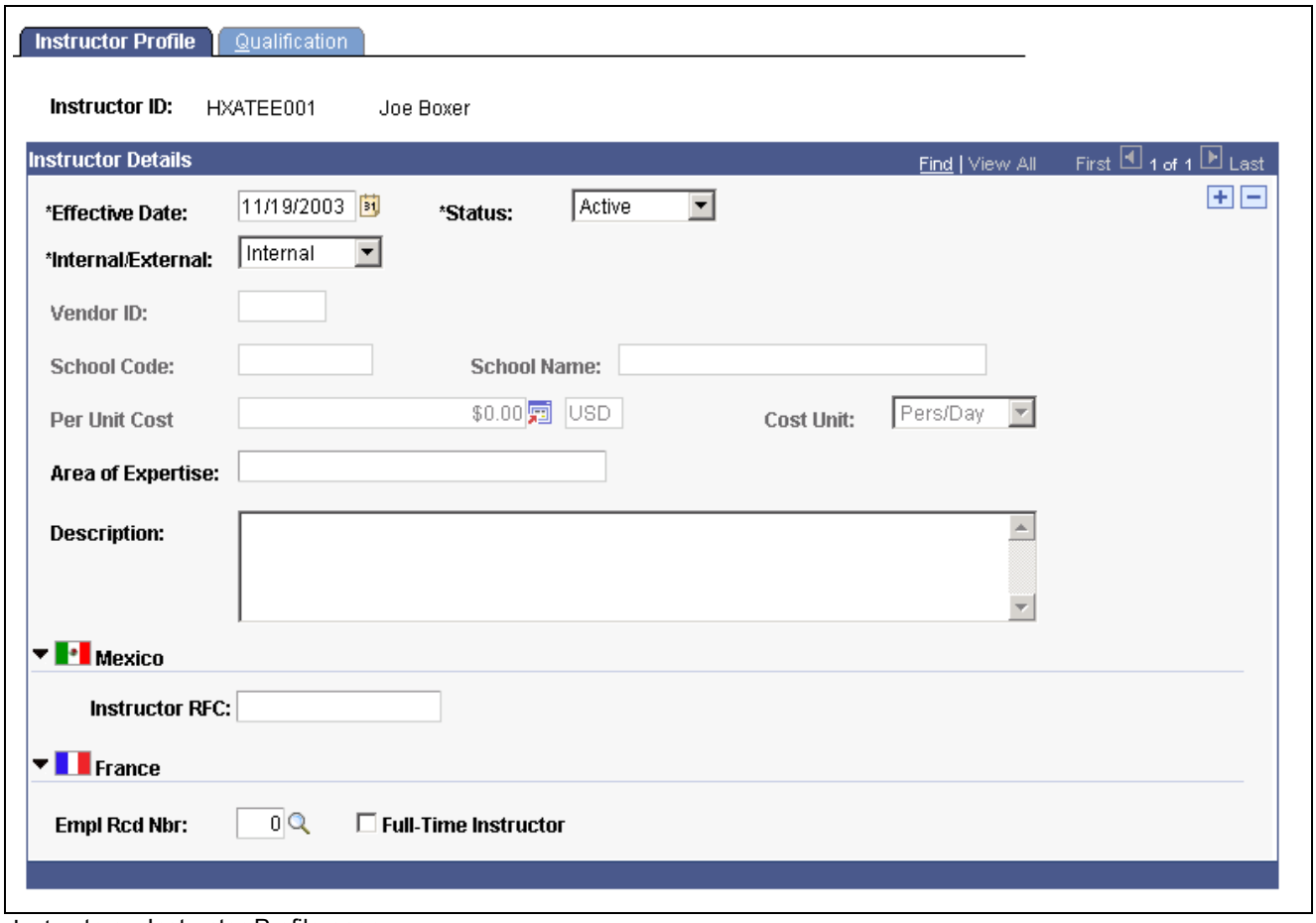
Pages Used to Set Up Instructors

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

Adding Instructors

Access the Instructors - Instructor Profile page.

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Instructors - Instructor Profile page

An individual must have a person record in PeopleSoft Enterprise Human Resources in order to be added as an instructor.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources".

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

Internal/External The system populates this field as follows:

Internal: Instructor is an employee.

External: Instructor is a nonemployee.

Vendor ID Select a vendor ID if the instructor works for a vendor that you added through the Vendors component. If the instructor is internal, this field is unavailable.

School Code and **School Name** If the instructor works at a school that you added to the School Table page, select a school code. The system displays the school name. To enter a school that isn't in the School table, leave the School Code field blank and enter a name in the School Name field.

If the instructor is internal, these fields are unavailable.

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Per Unit Cost Enter the per unit cost for this instructor. This value is used as the default instructor cost in the course cost setup. If the instructor is internal, the cost for the instructor appears as the default from the Trainees Salary Costs page.

See Chapter 3, "Setting Up Training Costs," Identifying Training Compensation by Employee, page 54.

Cost Unit Select a cost unit for the instructor's time.

Area of Expertise Enter a brief description of the instructor's area of expertise.

Comments Enter any further comments about the instructor's area of expertise. You don't need to specify the courses that the instructor teaches: these are added to the Instructors - Qualification page.

(MEX) Mexico

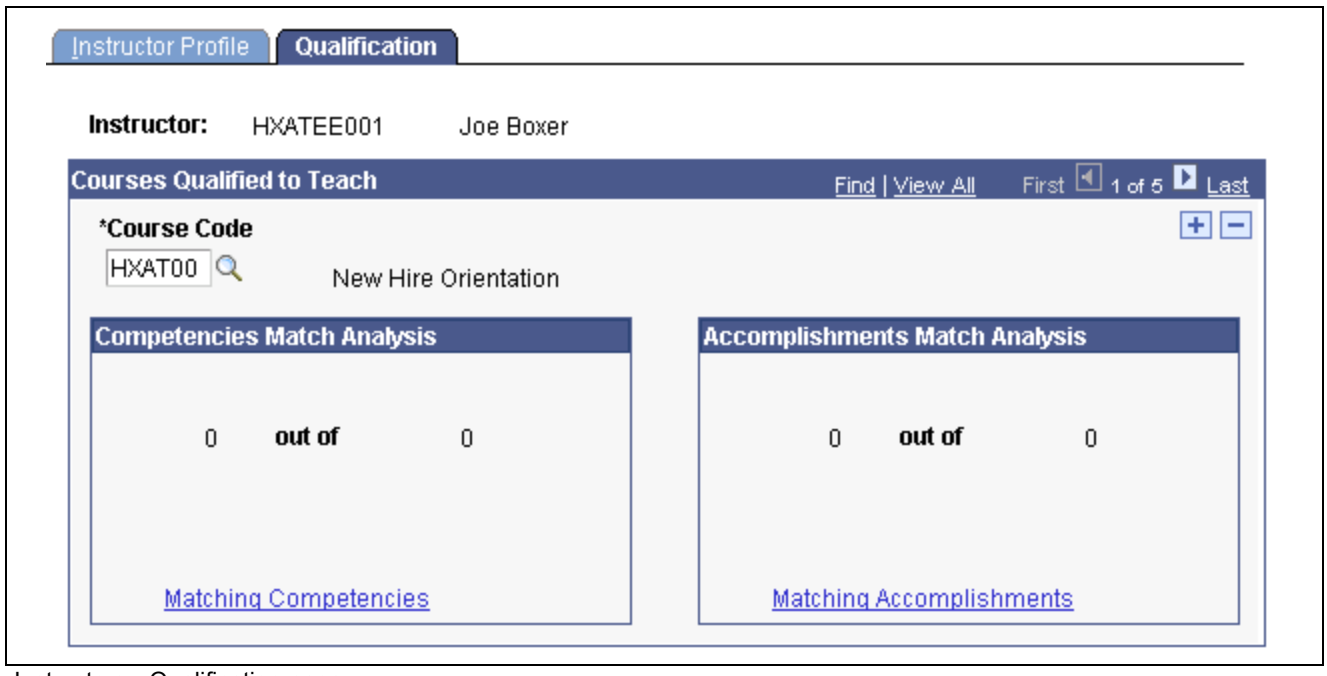
Instructor RFC Enter the RFC for the instructor.

(FRA) France

Full-Time Instructor Select if the instructor works full-time.

Defining Courses that an Instructor Is Qualified to Teach

Access the Instructors - Qualification page.



Instructors - Qualification page

Note. Complete this page after you define courses.

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Courses Qualified to Teach

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

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

Competencies Match Analysis

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

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

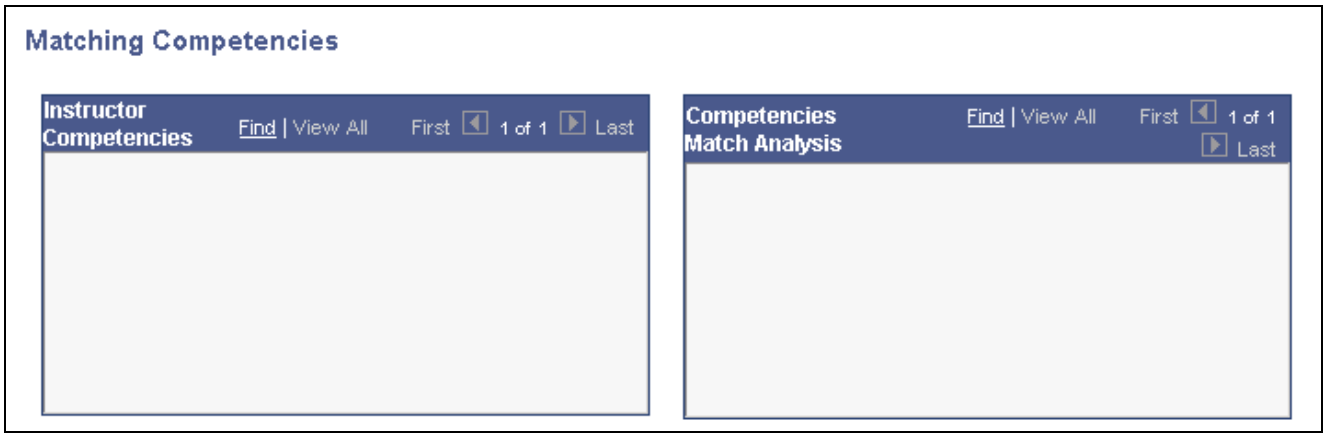
Accomplishments Match Analysis

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

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

Viewing Instructor Competencies

Access the Matching Competencies page.



Matching Competencies page

Instructor Competencies

This group box lists the competencies in the instructor's profile. The system compares the instructor's profile of type PERSON with the course requirements.

Competencies Match Analysis

This group box lists the competencies that are required to teach the course as defined on the Courses - Required Instr Comps/Accomps (courses - required instructor competencies and accomplishments) page. If the competency is included in the instructor's PERSON profile, the check box is selected.

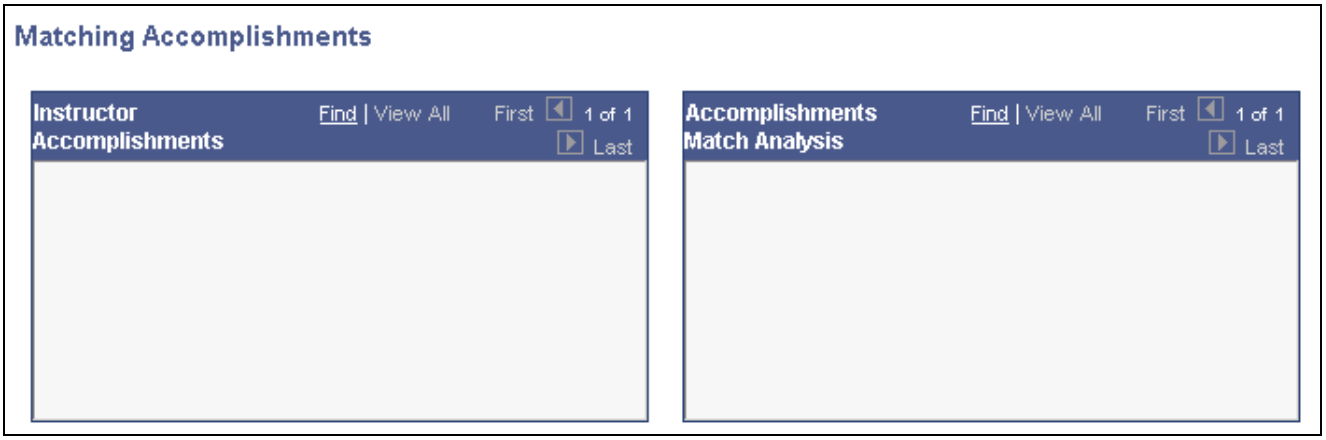
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See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Managing Profiles"

Viewing Instructor Accomplishments

Access the Matching Accomplishments page.



Matching Accomplishments page

Instructor Accomplishments

This group box lists the accomplishments in the instructor's profile. The system compares the instructor's profile of type PERSON with the course requirements.

Accomplishments Match Analysis

This group box lists the accomplishments that are required to teach the course as defined on the Courses - Required Instr Comps/Accomps (courses required instructor competencies and accomplishments) page. If the accomplishment is included in the instructor's profile, the check box is selected.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Managing Profiles"

Defining Course Categories

To set up course categories, use the Category/Subcategory (CATEGORY_TABLE) component.

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

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

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

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

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

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

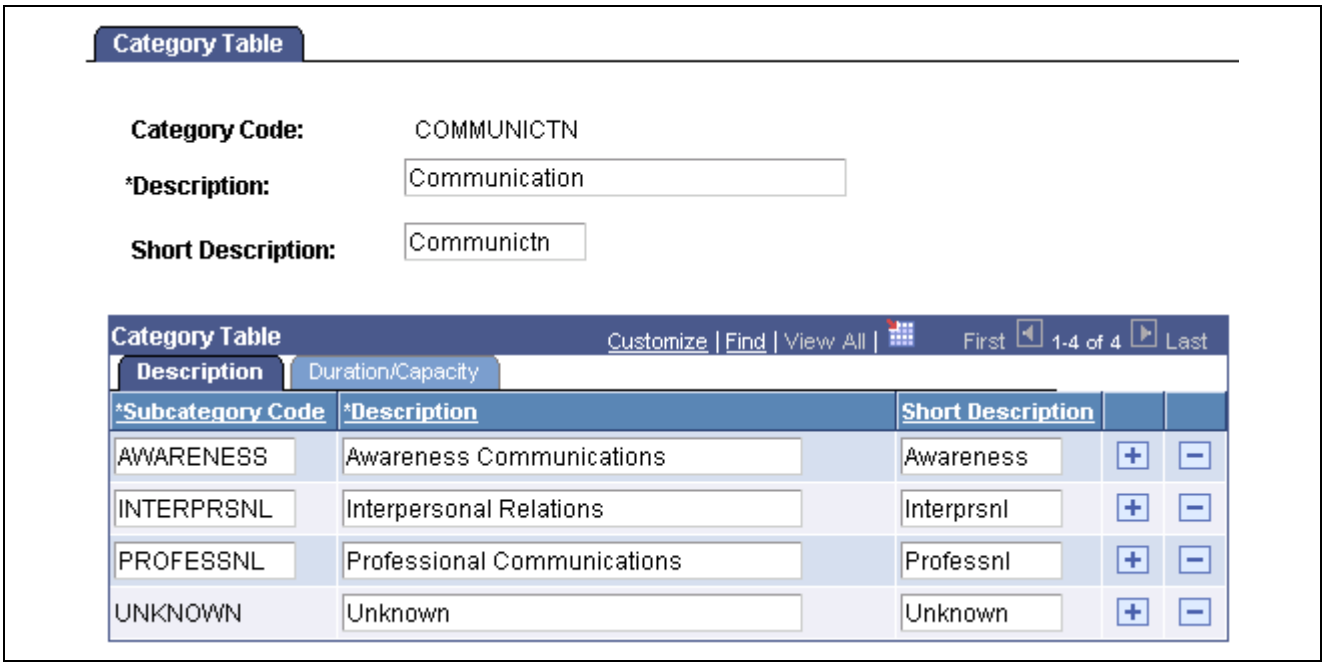
Page Used to Set Up Course Categories

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

Defining Course Categories

Access the Category/Subcategory - Category Table page.

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Category/Subcategory - Category Table page

Description tab

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

Duration/Capacity tab

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

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

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

See Also

Chapter 2, “Defining Training Courses and Programs,” Organizing the Course Catalog, page 33

Setting Up Courses

To set up courses, use the Courses (COURSE_TABLE2) component.

This section discusses how to:

- Define general course information.
- Define instructor competencies and accomplishments.
- Designate course prerequisites.
- Define equipment and materials required for a course.
- Specify course classification.

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- Specify course content, target audience, and agenda.

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

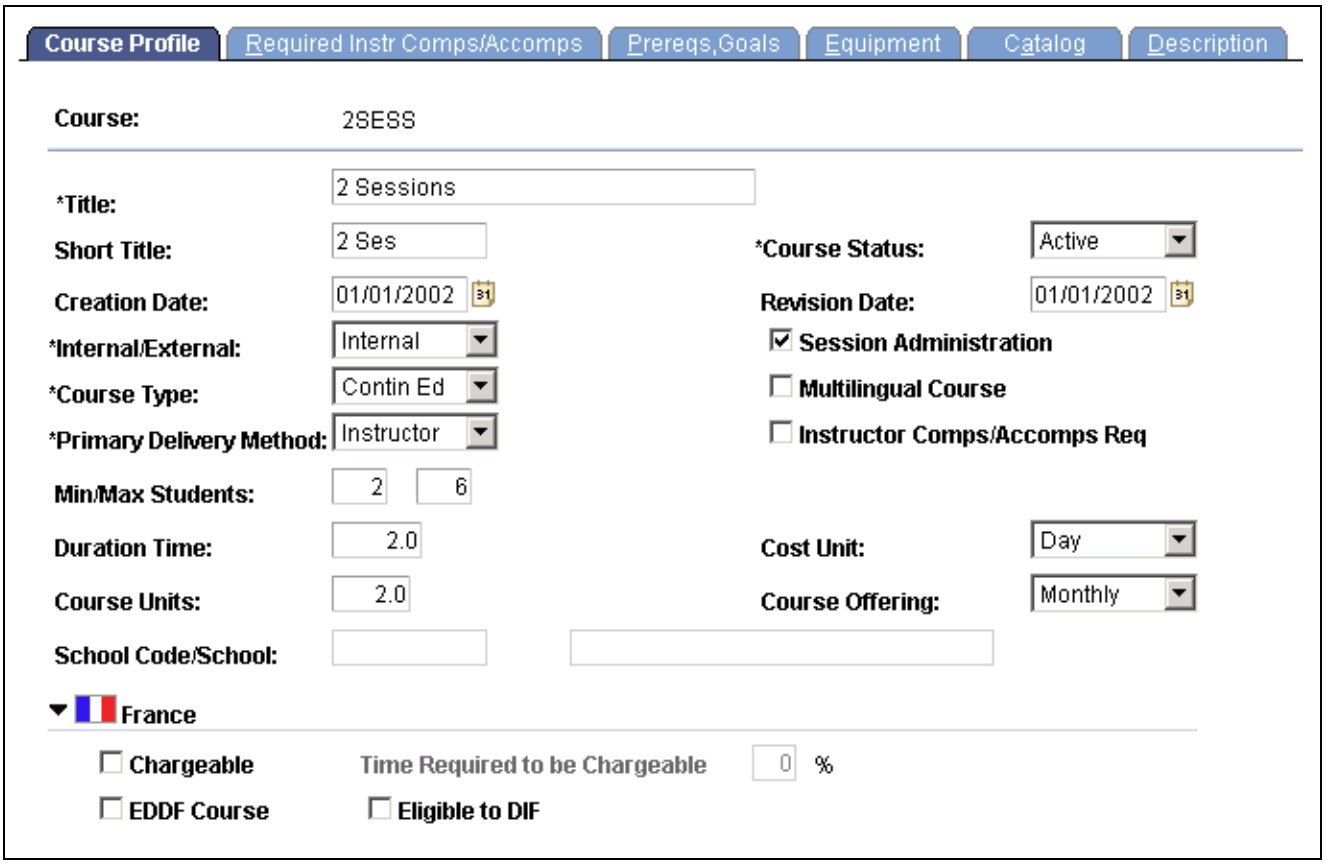
Pages Used to Set Up Training Courses

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

Defining General Course Information

Access the Courses - Course Profile page.

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Courses - Course Profile page

Title and **Short Title** — Enter the course title and an abbreviated title.

Course Status — Select from:

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

Inactive: You cannot set up a course session

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

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

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

Internal/External — Select *Internal* if the course is held in-house and *External* if the course is held offsite.

Session Administration — With Session Administration selected, you can create course sessions, set up waiting lists, enroll students in courses, and send out form letters.

You can select Session Administration for internal and external courses.

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

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

Select from:

Contin Ed: Continuing education.

Comp check: Competency check.

Functional

Mgmt Devel: Management development.

Skill Dev: Skill development.

Supv Skill: Supervisory skills.

Technical

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

Primary Delivery Method Select from:

Audio: For audio training, such as language tapes.

Computer: For computer-based training.

Instructor : For instructor-led courses.

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

Video: For video-based training.

Workbook: For self-taught courses with workbooks.

Instructor Comps/Accomps Req (instructor competencies /accomplishments required) Select to define a set of instructor competencies and accomplishments for the course. This check box is only available if the Primary Delivery Method is *Instructor.* Selecting this check box makes the Required Instr Comps/Accomps page available.

Min/Max Students (minimum/maximum students) Enter the minimum and maximum number of students that can enroll in the course.

Duration Time Enter the duration of the course.

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

Course Units Enter the number of course units for external courses.

Course Offering Indicate how often the course is offered.

School Code/School This field is not available for internal courses.

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

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

(FRA) France

The fields in this group box pertain to French regulatory reporting requirements.

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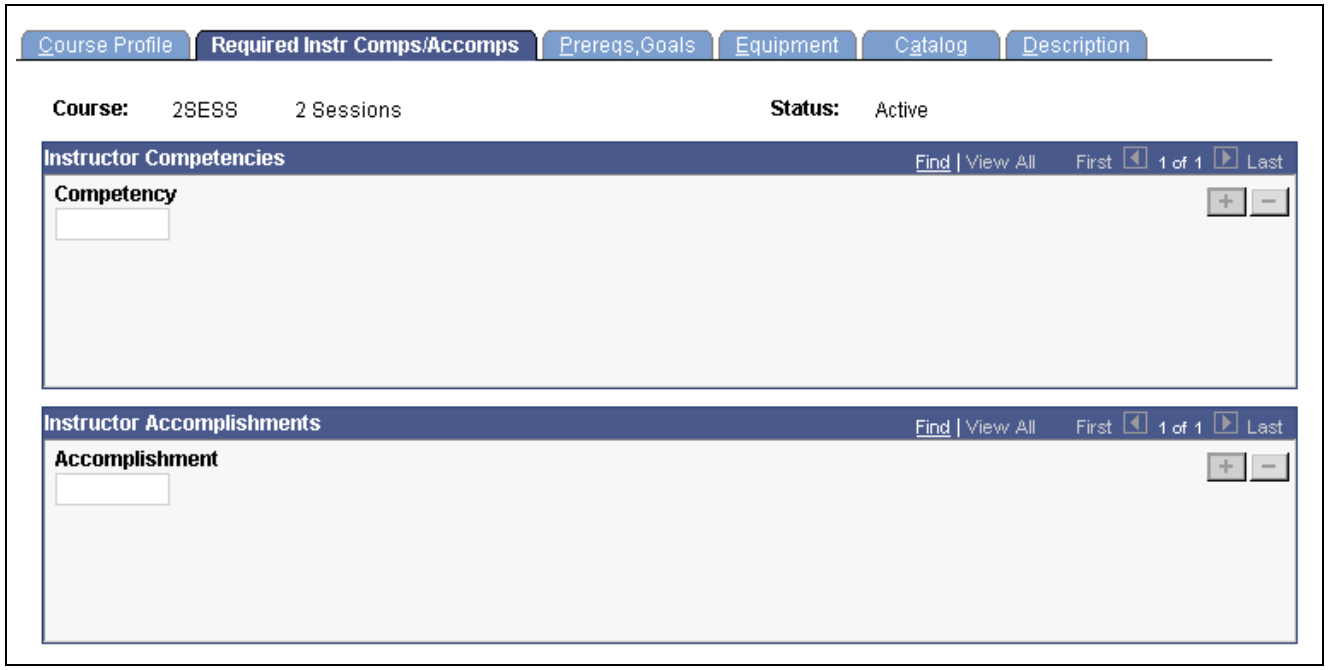
Chargeable	Select to have the costs that you enter for this course treated as chargeable, by default, for 2483 reporting. The Compute Student Cost process will consider this option when splitting the training cost by student.
Time Required to be Chargeable	Specify the percentage of this course's time that a student must attend for the course to be considered chargeable. For example, a value of 80% indicates that a student must attend at least 80% of the course for the course to be chargeable.
EDDF Course	Select if this course is eligible for funding under the *Engagement De Développment de la Formation* (EDDF). Costs related to EDDF courses appear on the 2483 report in Group C – Line 7.
Eligible to DIF	Select to enable students to request the use of DIF entitlement for this course and to enable administrators to record the DIF hours taken.

See Also

Chapter 12, "(FRA) Producing the French Training Report 2483," page 221

Defining Instructor Competencies and Accomplishments

Access the Courses - Required Instr Comps/Accomps page.



Courses - Required Instr Comps/Accomps page

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

Specify the competencies and accomplishments that instructors must have to teach this course. Competencies and accomplishments are defined in the Content Catalog, which is part of the Manage Profiles business process.

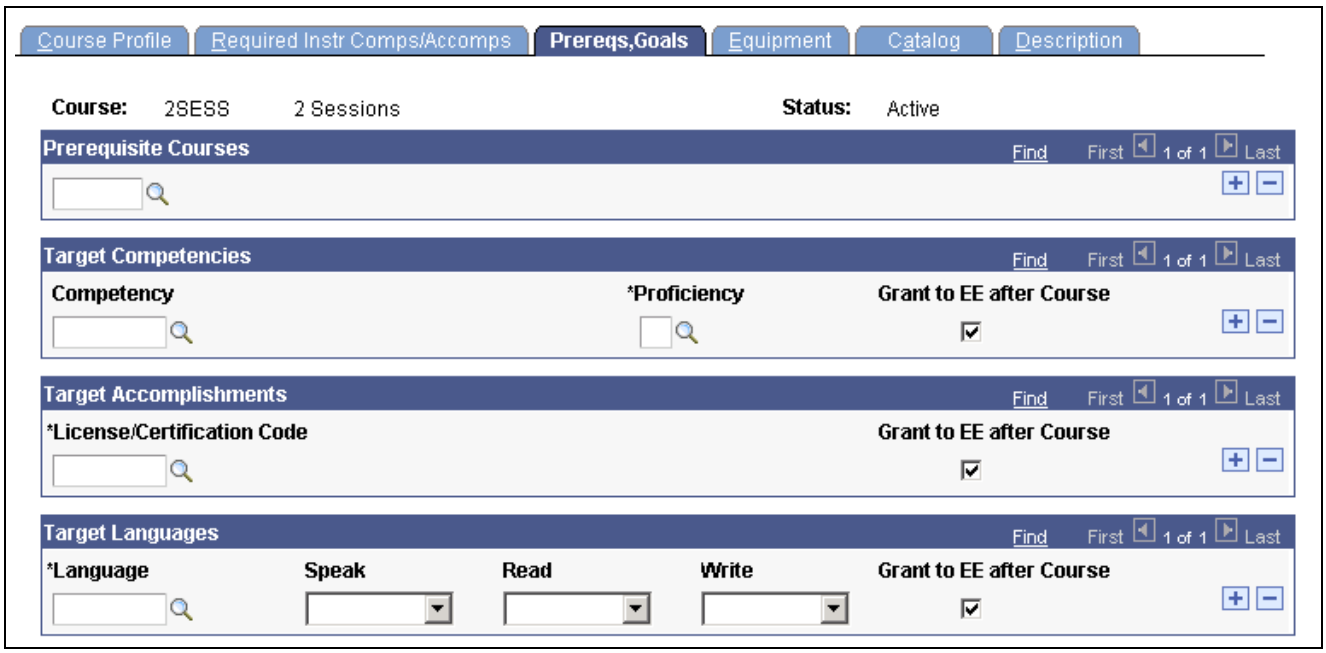
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"

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Specifying Course Prerequisites

Access the Prereqs,Goals page (prerequisites. goals page).



Prereqs,Goals page (prerequisites. goals page)

Prerequisite Courses

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

Target Competencies

Competency — Select a target competency. Competencies are defined in the Content Catalog, which is part of the Manage Profiles business process.

Proficiency — Select the default proficiency level for a competency that the student receives upon completing the course. For example, a beginner's course competency might give a rating of *Fair,* while an advanced-level course competency could warrant a rating of *Expert.*

Grant to EE after Course (grant to employee after course) — Select to have the system add the selected competency to the employee's profile and set the specified proficiency rating upon completing the course. The system adds the competency to the employee's profile with the profile type PERSON. Competencies that are automatically assigned to an employee's profile have the evaluation type *Approved/Official.*

Target Accomplishments

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

Grant to EE after Course (grant to employee after course) — Select to have the system update employees' profiles upon course completion. The system adds the accomplishment to the employee's profile with the profile type PERSON.

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Target Languages

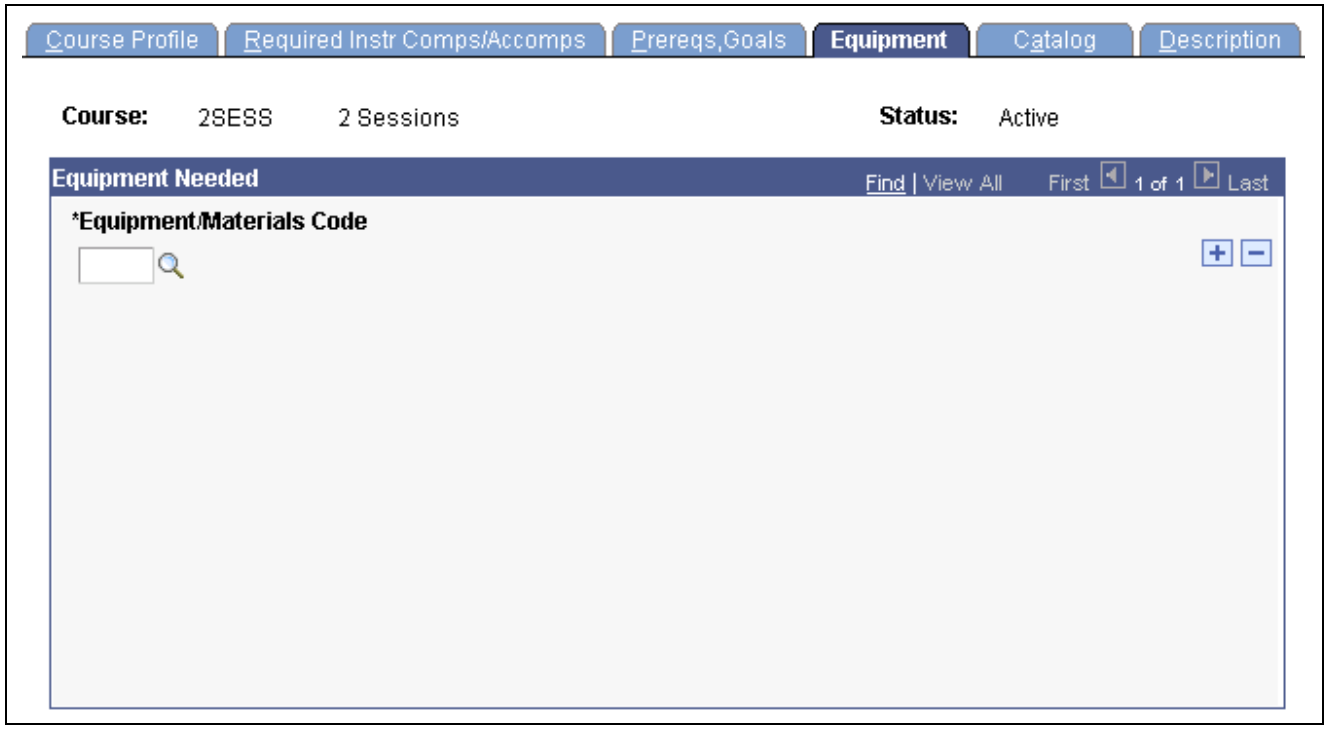
Language	Select a language.
Speak, Read, Write	Select *High, Moderate,* or *Low* in each field to indicate the level of proficiency that you expect students to have achieved upon completion of the course.
Grant to EE after Course (grant to employee after course)	Select to have the system update employees' profiles upon course completion. The system adds the accomplishment to the employee's profile with the profile type PERSON.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Managing Profiles"

Defining Course Equipment and Materials

Access the Courses - Equipment page.



Courses - Equipment page

Specify the equipment and materials that are needed for the course. Define equipment and materials on the Equipment and Materials page.

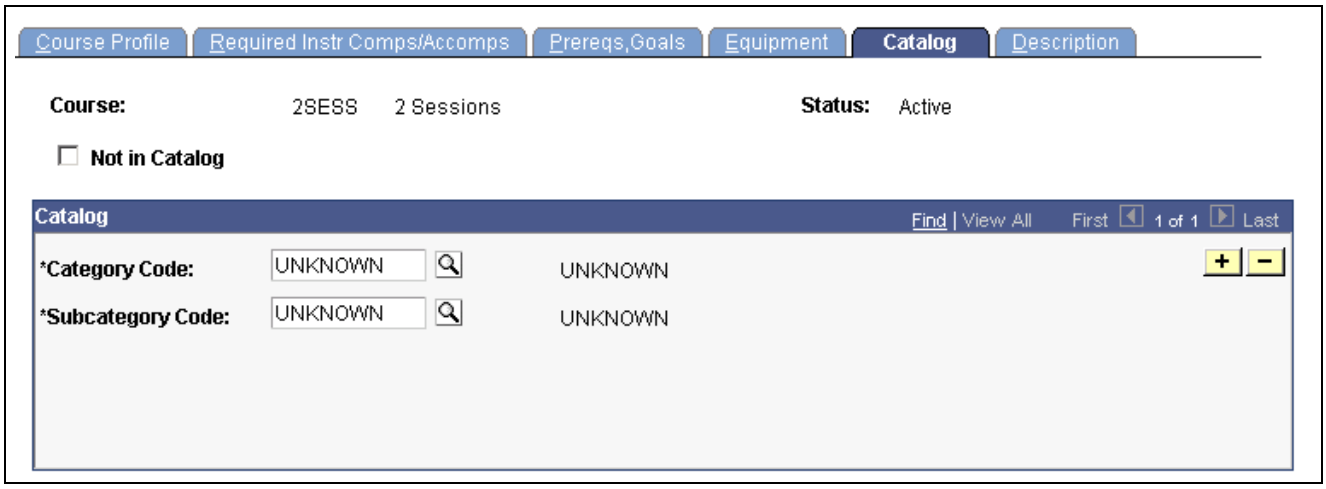
See Also

Chapter 2, "Defining Training Courses and Programs," Setting Up Training Equipment, Materials, and Facilities, page 12

Specifying Course Classification

Access the Courses - Catalog page.

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Courses - Catalog page

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

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

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

Catalog

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

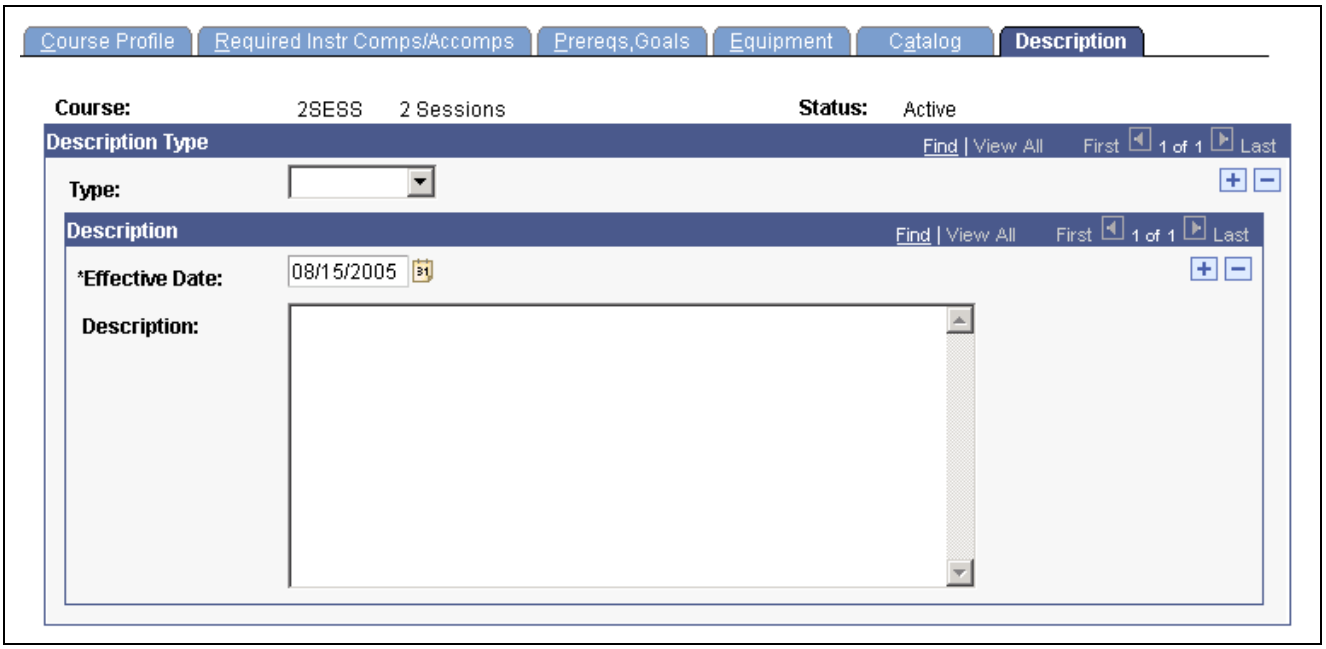
Category Code and **Subcategory Code** To add a course to the catalog, select a category code and a subcategory code. Define categories and subcategories on the Category Table page.

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

Specifying Course Content, Audience, and Agenda

Access the Courses - Description page.

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Courses - Description page

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

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

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

Organizing the Course Catalog

To organize the course catalog, use the Catalog Organization (TRN_CATALOG_MOVE) component.

This section discusses how to examine and adjust the category and subcategory organizational structure of the catalog. You add courses to the catalog through the Courses - Catalog page.

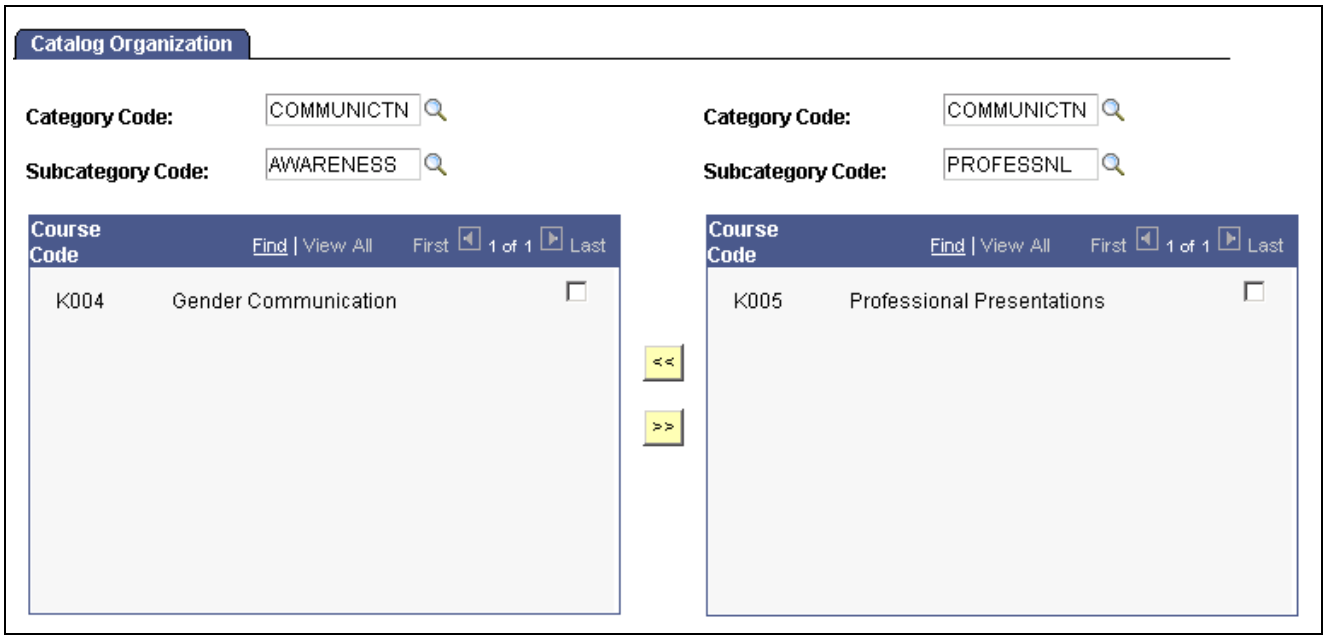
Page Used to Organize the Course Catalog

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

Viewing and Reorganizing Courses

Access the Catalog Organization page.

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Catalog Organization page

To view courses in a selected subcategory, select the category code and subcategory code in the left or right column. The system lists the courses in that subcategory.

To move courses from one subcategory to another, select the check box next to the course name. In the other column, find the category and subcategory into which you want to move the selected course. Click the appropriate arrow button to move the selected course into the other column.

Setting Up Training Programs

To set up programs, use the Program Information (TRN_PROGRAM_TABLE) component.

Training programs group courses into a logical progression. You can associate training programs with job codes in the Job Code Table.

This section discusses how to create training programs.

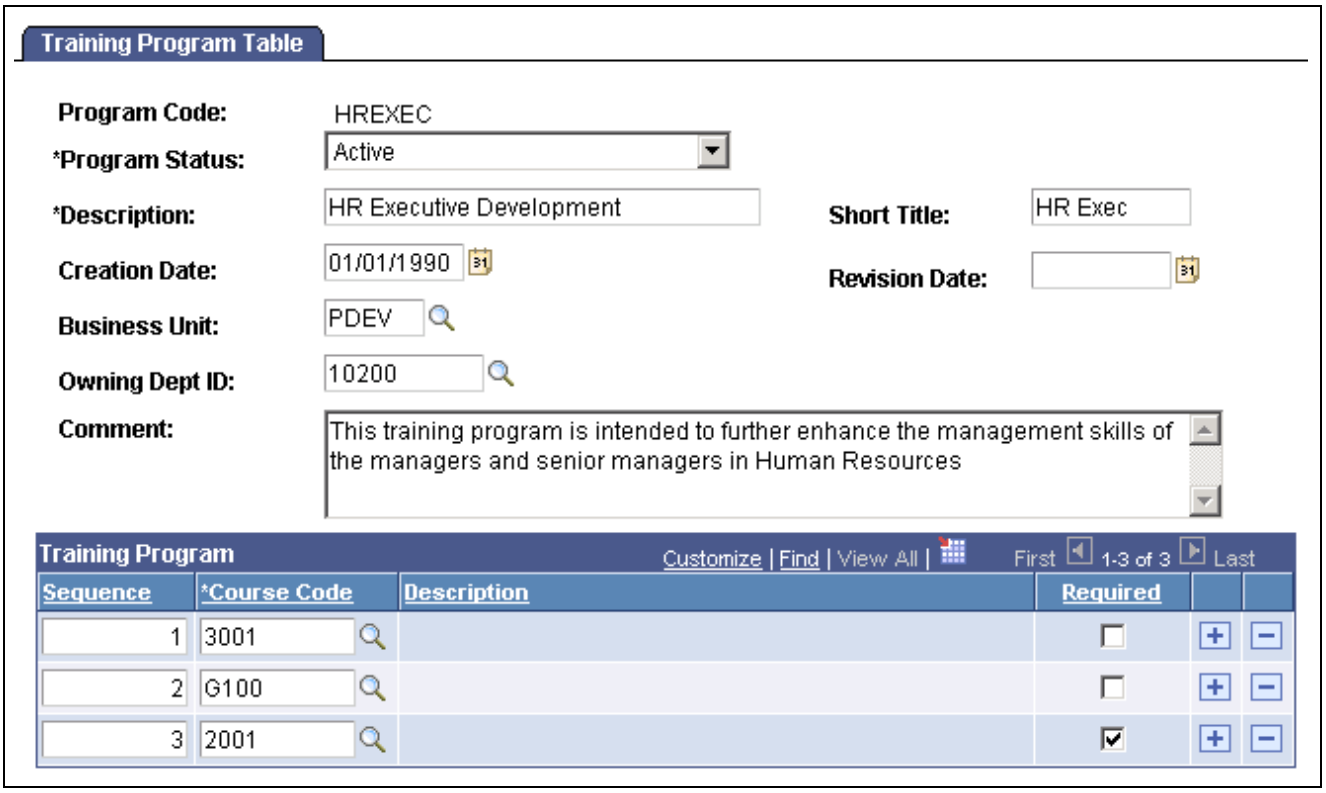
Page Used to Set Up Programs

Page Name	Object Name	Navigation	Usage
Training Program Table	TRN_PROGRAM_TABLE	Set Up HRMS, Product Related, Enterprise Learning, Program Information, Training Program Table	Create a training program.

Creating Training Programs

Access the Training Program Table page.

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Training Program Table page

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

Short Title Enter an abbreviated description of the training program.

Creation Date The default is the system date (usually today's date).

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

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

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

Training Program

Sequence The system sorts courses by course code. If you want the codes that you select in the Course Code field to appear in a different order, enter sequence numbers in this field to define the order in which students should take courses.

To view the new order, save the changes and close the page. When you open the page again, the courses appear in the new order.

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

Required Select if the course is mandatory.

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Setting Up Noncourse Training

Use the Non-Course Training (NON_COURSE_TBL) component to set up noncourse training.

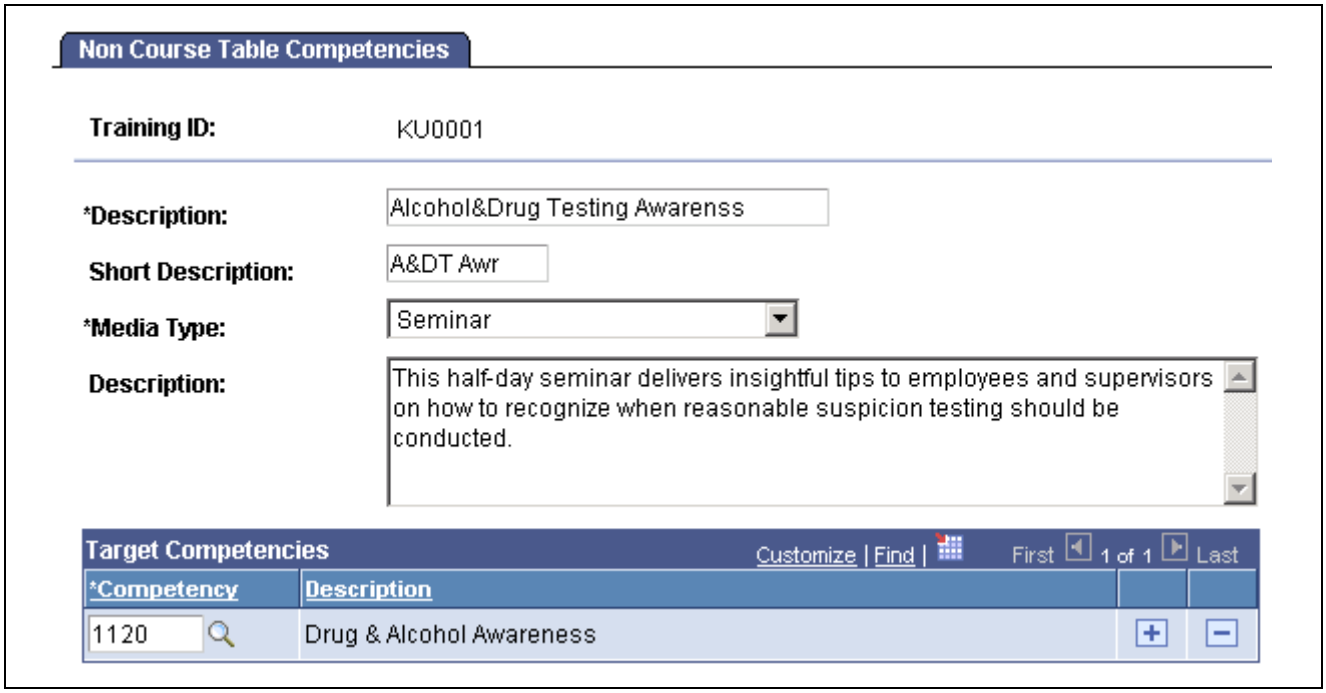
Not all training involves taking a course or attending a class, so you may need to establish training IDs for other forms of training, such as multimedia CD-ROM presentations, videos, or self-paced training guides. This section discusses how to set up noncourse training.

Page Used to Set Up Noncourse Training

Page Name	Object Name	Navigation	Usage
Non Course Table Competencies	CM_NON_CRSE_TABLE	Set Up HRMS, Product Related, Enterprise Learning, Non-Course Training, Non Course Table Competencies	Track training that isn't course-based.

Setting Up Noncourse Training

Access the Non Course Table Competencies page.



Non Course Table Competencies page

(MEX) Creating Training and Development Plans

Companies that operate in Mexico must create training and development plans for their employees. You can store the details for the training and development plans on the Training Program Table page.

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Each plan identifies the courses and events that meet the training and development needs of the workforce. Each course or event should have a detailed description of the objective and activities. Training can be internal or external. Depending on the type of training, there are specific legal forms to fill out. The mixed committee for training and development must review and approve the training plan.

See Also

Chapter 2, "Defining Training Courses and Programs," Setting Up Training Programs, page 34

Running Training Course and Training Program Reports

This section discusses training course and program reports.

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Pages Used to Run the Reports

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

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CHAPTER 3

Setting Up Training Costs

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

- Select the base currency for training costs.
- Set up training cost units.
- Define default training costs.
- Define student costs.
- Define training budget periods and department allocations.

Understanding Training Costs

This section provides an overview of:

- Training cost and budget setup.
- Training currencies.

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

Training Cost and Budget Setup

To administer training budgets, you need to set up a budgeting structure. Once you set up the basic costs, you can enter budgets for departments in the organization.

To set up training costs and budgets:

1. Set up a training currency.

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

2. Review cost units.

   Cost units are associated with a cost amount. For example, you might use a cost unit of hours or days to measure instructor costs, but use a cost unit of kilometers for mileage. To enter a cost, enter the amount and then select a cost unit for that amount. PeopleSoft delivers a set of cost units in the Cost Unit table that you can add to.

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

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

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4. Set up student costs.

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

5. Set up budget periods and departmental budgets.

See Also

Chapter 3, "Setting Up Training Costs," Defining Default Training Costs, page 46

Chapter 3, "Setting Up Training Costs," Defining Student Costs, page 52

Chapter 3, "Setting Up Training Costs," Defining Training Budget Periods and Department Allocations, page 58

Training Currencies

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

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

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

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

To set up training cost currency information:

1. Create a currency rate type for Budget Training.

   Create a rate type for budgeting on the Rate Type page by selecting Set Up HRMS, Foundation Tables, Currency and Market Rates, Currency Exchange Rate Types.

2. Set up a training currency exchange rate.

   Define the exchange rates that you want the budgeting processes to use by selectingSet Up HRMS, Foundation Tables, Currency and Market Rates, Market Rates.

3. Set up the base currency for Budget Training.

   Even if you have already defined a base currency for PeopleSoft HRMS in step 1, you must define a special training base currency before you can establish any training costs in the Training Administration business process.

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Training Base Currency Defaults

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

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

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

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

Training Cost Currency Conversions

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

Cost Type	Currency
Training element cost; for example, facility cost	Costs are stored in the currency that you enter.
Course costs and catalog costs	Costs are stored in table TRN_ALL_TABLE in the entered currency. Computed costs are stored in TRN_CST_ELEMENT with the base currency. The system uses the effective date that is entered on the page as the currency conversion date.

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Cost Type	Currency
Salary costs (general demand)	Costs are stored in table TRN_DEMAND in the currency that you entered. The system stores computed costs in TRN_CST_ELEMENT in the base currency. The date that the system uses for the conversion from the entered currency to the base currency is the begin date of the budget period for which the demand was defined.
Displayed costs (summary pages, budget plan)	The system converts costs from the base currency to the displayed currency. The date that the system uses for the conversion is the begin date of the budget period.

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

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

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

See Also

Chapter 3, “Setting Up Training Costs,” Defining Default Training Costs, page 46

Chapter 3, “Setting Up Training Costs,” Defining Student Costs, page 52

Selecting the Base Currency for Training Costs

To define the base currency for training costs, use the Base Currency (TRN_BASE_CURRENCY) component.

The first step in setting up training costs is to define the currency to be used in the Budget Training business process. Use this component to convert all costs to one common currency that appears in the training plan and is the sum of all training costs.

This section discusses how to select the base currency and the exchange rate type.

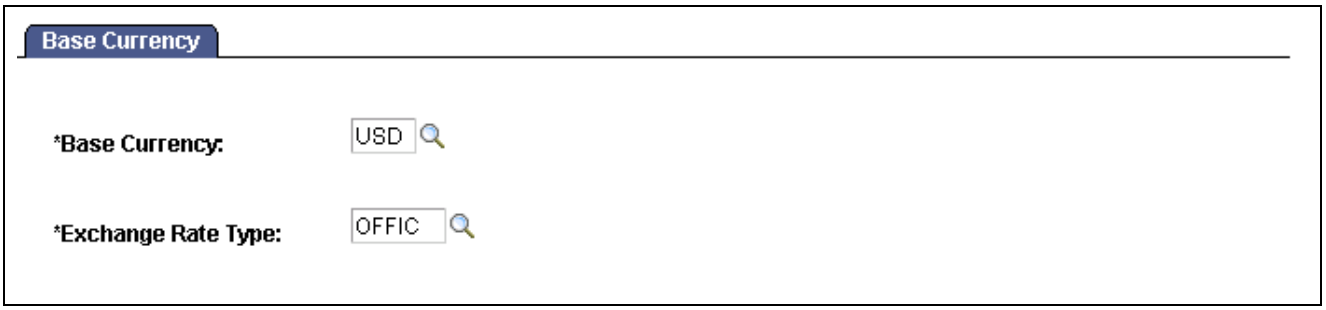
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Page Used to Select the Base Currency for Training Costs

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

Specifying the Base Currency

Access the Base Currency page.



Base Currency page

Warning! Set the base currency before entering costs in Budget Training.

Base Currency Select a currency code.

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

Exchange Rate Type If you defined an exchange rate type for training, associate it with the base currency here. The exchange rate type that you specify controls currency conversion processing in the Administer Training and Budget Training modules. Define exchange rate types on the Currency Exchange Rate Types page.

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

See Also

Chapter 3, "Setting Up Training Costs," Defining Default Training Costs, page 46

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Currencies"

Setting Up Training Cost Units

This section provides an overview of training cost units and discusses how to specify the relationship between the cost unit and duration label.

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Understanding Training Cost Units

When you enter costs for facilities, vendors, books, and other training-related items, you associate the amount with a cost unit, such as hour or flat cost, as a measurement criterion. The cost units from which you can select depend upon the type of cost (the cost unit type) that you're entering.

Using Views to Select the Right Cost Unit

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

For expenses, the system performs no special cost unit type selection: you can select any Cost Unit table (COST_UNIT_TABLE) values.

Using Cost Type and Duration Amounts

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

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

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

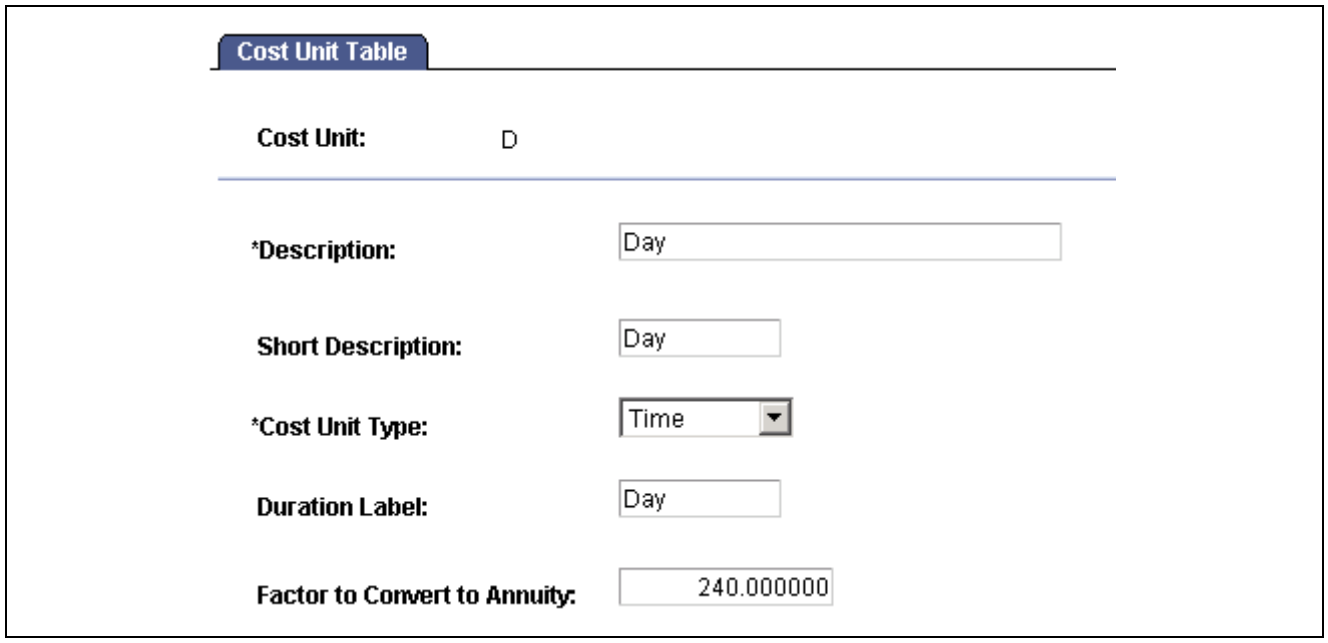
Page Used to Modify Training Cost Units

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

Specifying the Relationship Between the Cost Unit and Duration Label

Access the Cost Unit Table page.

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Cost Unit Table page

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

Note. (FRA)Company Costs, *C,* defines costs that are to be charged at the company level. This value is defined on the Trn 2483 Parameters Setup page and is fully reported on the 2483 report.

Paid Hours, *P,* is used by the system as the default during duration conversion.

For a more accurate computation with cost–based on employee salary, use the cost unit, *P.* When prorating the student/instructor monthly salary with the session duration, the proration is done with the paid hours field instead of the factor. For example if the session is equal to 10 hours, and the instructor is paid 200 EUR per hour, when you look on the Trainees Salary Costs page for this employee, you will see that the salary for January is 200 EUR per month, and the Paid Hours are 180 hours.

When prorating the instructor costs with the session duration, you get 200 / 180 * 10. If the cost unit were *Pers/Month*, the computation rule would be 200 / (1920/12) *10= 200/160 * 10.

Cost Unit Cost units are delivered as system data.

Note. (FRA) Cost unit *C* represents company costs. These costs are fully reported on the 2483 report. Cost unit *P* represents paid hours. When the system calculates an employee's salary costs while attending a session, it can use cost unit *C* (paid hours) rather than the factor entered in the Factor to Convert to Annuity field to prorate the employee's monthly salary based on the session duration.

Cost Unit Type Select a cost unit type to group similar cost units together.

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

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

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

Training: For training cost types (for example, flat cost or person per day).

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

Company: For costs that are to be charged at the company level.

Duration Label Enter the duration label to use for specifying instructor cost details. The unit of this duration depends on the cost unit that you select. For example, if the instructor cost unit is 200 USD per person, per day, the duration is expressed in days.

Factor to convert to annuity This field only appears when the cost unit type is *Time*. It specifies how many units there are in a year. For example, if the cost unit is D (day), a factor of 240 means that there are 240 days in the year.

The delivered values are as follows:

For cost unit D (day), the factor is 240 and is based on 20 days per month.

For cost unit H (hour), the factor is 1920 and is based on 8 hours per day and 20 days per month.

For cost unit M (month), the factor is 12.

For cost unit W (week), the factor is 48 and is based on 4 weeks per month.

For cost unit Y (year), the factor is 1. You cannot change this value.

Note. If you need to modify the factor, do so before entering any costs in the system. Cost elements are updated online as soon as training element costs are entered. If you change the annuity factor during a budget period, costs already computed are not affected.

Defining Default Training Costs

To set up default training costs, use the Catalog Costs (TRN_COST_TABLEC) and the Course Costs (TRN_COST_TABLE) components.

This section lists prerequisites, provides an overview of default training costs, and discusses how to:

- Enter vendor, facility, and equipment costs.
- Enter instructor costs and other expenses.

Understanding Default Training Costs

Some costs that you enter in the Catalog Cost table, the Course table, and Course Session Cost table tend to be the same. For example:

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

Catalog Costs

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

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

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

Course Session Costs

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

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

Note. The Budget Training process uses catalog and course costs only. Cost demands can also occur on the catalog and course level. Session costs are only used by the Administer Training business process. When trainees are enrolled in a session, Administer Training computes the cost at a session level.

See Also

Chapter 6, “Administering Course Sessions,” page 113

Prerequisites

Before you define default costs for courses, you must set up training courses.

See Also

Chapter 2, “Defining Training Courses and Programs,” page 5

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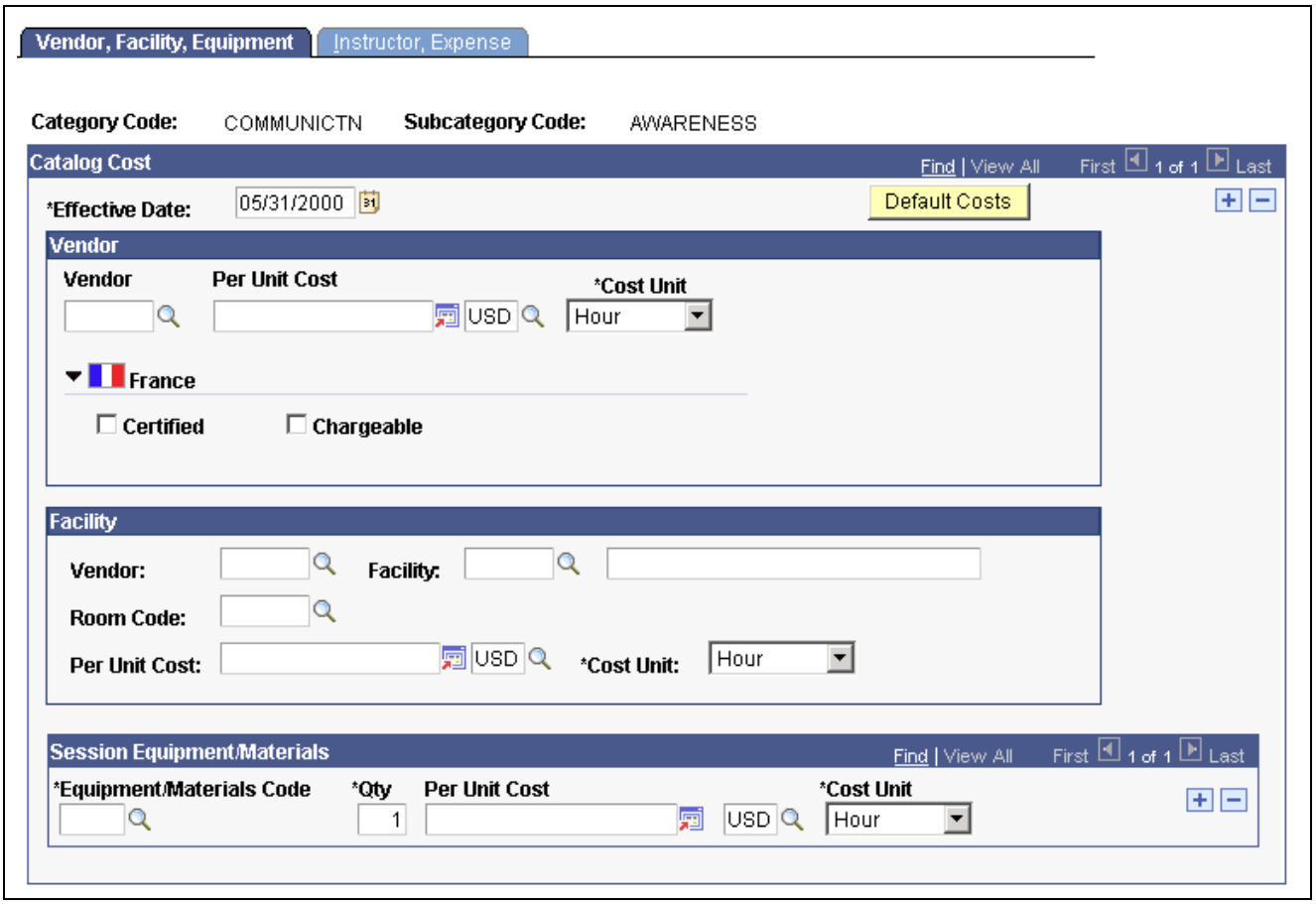
Pages Used to Set Up Default Training Costs

Page Name	Object Name	Navigation	Usage
Catalog Costs - Vendor, Facility, Equipment	TRN_COSTC_TBL1_GBL	Set Up HRMS, Product Related, Enterprise Learning, Catalog Costs, Vendor, Facility, Equipment	Enter the default vendor, facility, and equipment costs for a category or subcategory that is defined on the Category/Subcategory Table page.
Catalog Costs - Instructor, Expense	TRN_COSTC_TBL2_GBL	Set Up HRMS, Product Related, Enterprise Learning, Catalog Costs, Instructor, Expense	Enter default instructor costs and other expenses that are associated with courses in a selected category or subcategory.
From which Category/Sub-Category	TRN_CATLG_CRSE_SEC	Click the Default Costs button on the Catalog Costs - Vendor, Facility, Equipment page or the Course Costs - Vendor, Facility, Equipment page.	Select the source of default costs.
Course Costs - Vendor, Facility, Equipment	TRN_COST_TBL1_GBL	Set Up HRMS, Product Related, Enterprise Learning, Course Costs, Vendor, Facility, Equipment	Define the cost of courses in a training catalog. These costs may be the same as the costs associated with the category or subcategory to which the course belongs.
Course Costs - Instructor, Expense	TRN_COST_TBL2_GBL	Set Up HRMS, Product Related, Enterprise Learning, Course Costs, Instructor, Expense	Enter default instructor costs and other expenses that are associated with courses in a selected category or subcategory.

Entering Vendor, Facility, and Equipment Costs

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

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Catalog Costs - Vendor, Facility, Equipment page

Default Costs Click to populate the cost fields with default costs that you have defined for the category or subcategory. The From which Category / Sub-Category page appears. You can use default course costs from a category or a subcategory according to the catalog structure. To use costs from the category level, select the category code and enter UNKNOWN in the Subcategory Code field.

Vendor

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

Vendor Select the default vendor for the category or subcategory.

Per Unit Cost The system displays the cost that you defined, if any, on the Vendor table for the selected vendor. You can override the default value.

(FRA) Certified Select if the vendor is certified to provide the training courses.

(FRA) Chargeable Select to make the training course a chargeable item for the 2483 report. When selected, related costs that you enter are reported in the 2483 report. This is used to meet French legal reporting requirements. The system derives the default value from the chargeable flag set in the Course setup page and by the Compute Student Cost process.

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Facility

If you use a vendor's facility for the course, complete the fields in this group box, as applicable.

Facility Select a facility that you defined using the Training Facilities (TRN_FACILITY_TBL) component. If the facility has not been defined, enter the facility name in the unlabeled field.

Room Code Select a room for the courses from the list of rooms that are available at the selected facility.

Per Unit Cost By default, the system displays the room cost from the Training Facilities component. You can override the default.

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

Session Equipment/Materials

Equipment/Materials Code Select the equipment code. Insert a row for each equipment or material code required for the course. Define equipment and materials on the Equipment and Materials Table page.

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

See Also

Chapter 12, "(FRA) Producing the French Training Report 2483," page 221

Defining the Source of Default Costs

Access the From which Category/Sub-Category page.

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

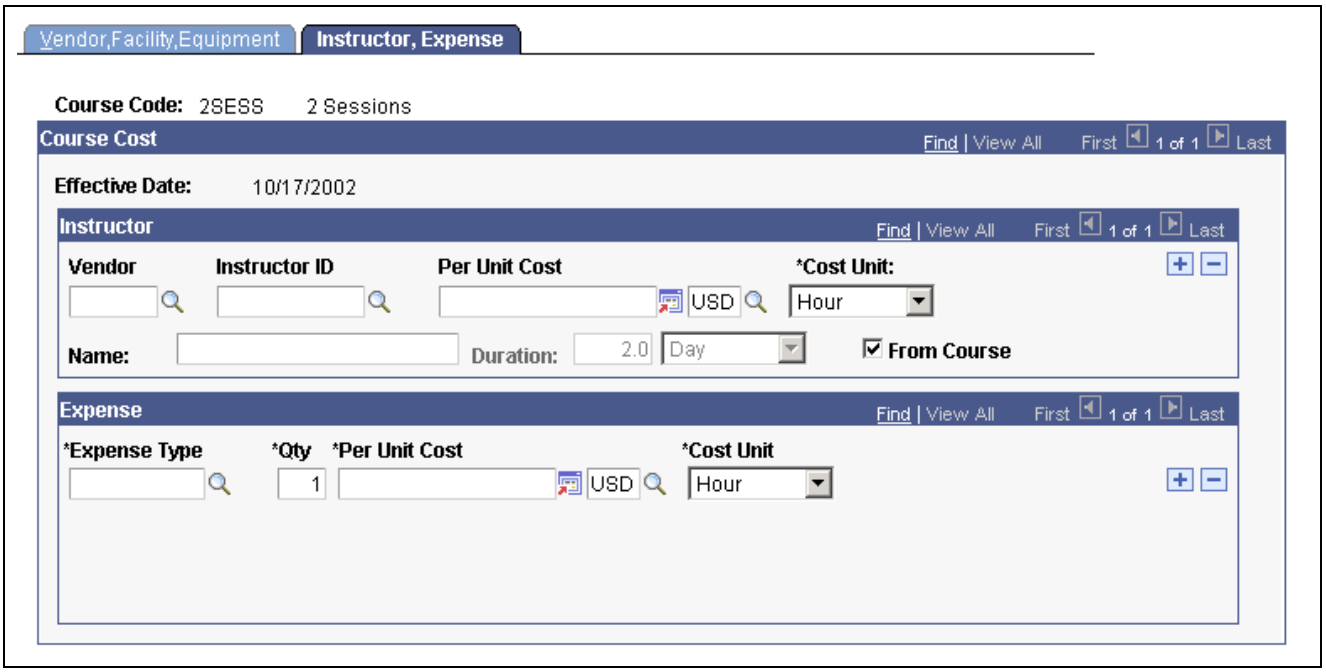
Subcategory Code Select the subcategory codes.

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

Entering Instructor Costs and Other Expenses

Access the Course Costs - Instructor, Expense page.

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Course Costs - Instructor, Expense page

Instructor

Vendor — If an external vendor runs the course, select the vendor. Define vendors using the Vendors (TRN_VENDOR_TABLE1) component. If you're using an internal instructor, leave this field blank.

Instructor ID and **Name** — If the instructor is defined in the Instructor table, select the instructor ID. Otherwise leave this field blank and enter the instructor's name in the Name field.

Per Unit Cost — This value is automatically populated from the Instructor table. You can override the default cost.

Duration — This field is automatically populated with the Duration value that you set up on the Course Table - Course Profile page. To override the default, clear the From Course check box and enter the new value.

From Course — This check box is automatically selected to show that the Duration field is populated from the Course table.

Expense

Expense Type — Select the expense type.

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

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

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Defining Student Costs

To set up student costs, use the Job Code Salary Costs (TRN_JOB_SLR_COST) and the Trainees Salary Costs (TRN_EE_SALARY_COST) components.

This section provides as overview of student costs and discusses how to:

- Identify the training compensation cost by job.
- Identify the training compensation cost by employee.
- Process salary costs for a group.

Understanding Student Costs

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

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

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

To track payroll costs that are associated with training, you can specify compensation costs at the job code level and at the individual employee level. To associate payroll costs with a group of similar job codes or a group of employees, use the Update Salary Cost page to perform a mass update of the system.

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

(FRA) Importing Salary Costs from Payroll

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

Source of Default Costs for Job Code and Employees

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

Page Name	Default Comes From
Job Code Training Cost	No default.
Trainees Salary Costs	Job Code Training Cost page.
Employee Demand	1. Trainees Salary Costs page, when defined. 2. Otherwise Job Code Training Cost page (with employee's job code). 3. Otherwise default values are set to blank.

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Page Name	Default Comes From
General Demand	Default values are set to blank; however, when a profile is used as a template, the training cost is computed with the employees and job codes that are included in the profile. Click the Compute button to compute the training cost with the job codes that are listed on the page.
Department Demand	No default.
Employee Demand by Course	Same as the Employee Demand page.

Pages Used to Set Up Student Costs

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

Identifying the Training Compensation Cost by Job

Access the Job Code Training Cost page.



Job Code Training Cost page

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

Paid Hours Displays the total number of hours worked by an employee for which they are paid.

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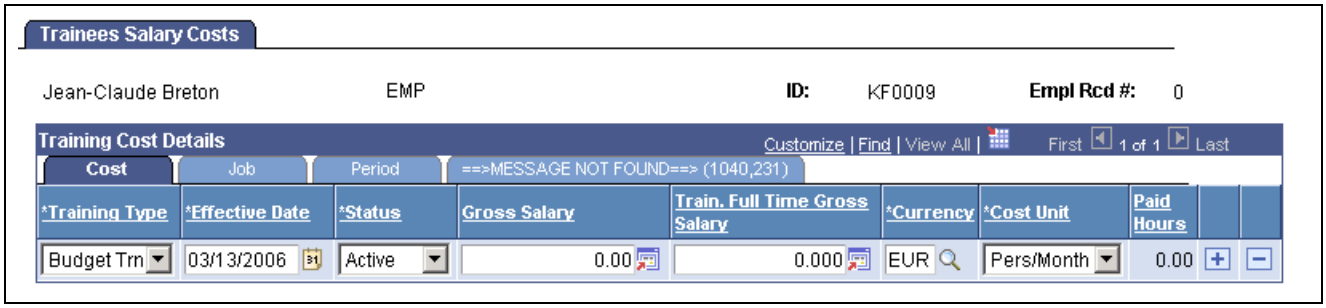
If you select *Apply on Jobcodes* or *Apply on Employees* in the Populate Process Mode group box on the Update Salary Cost-Enterprise Learning, Define Budget, Update Salary Costs page, you may manually enter the hours that the employee works.

If you select *Load from Global Payroll* in the Populate Process Mode group box on the Update Salary Cost-Enterprise Learning, Define Budget, Update Salary Costs page, the system gets the value for Paid Hours from payroll and is deactivated for manual entry.

Note. The system derives this value from payroll. Paid Hours calculates how many hours the employee works for the related cost unit, that is, if the cost unit is Pers/Month, then the number of hours is related to one month.

Identifying Training Compensation by Employee

Access the Trainees Salary Costs page.



Trainees Salary Costs page

Common Page Information

Training Type

Select one of these options:

- *Admin. Trn* (administer training).

  Select this option if the cost is an administered course cost.

  See Chapter 9, "Tracking Training Costs," page 177.

- *Budget Trn* (budget training).

  Select this option if the cost is a budgeted training cost.

  See Chapter 5, "Planning Training Budgets," page 85.

Gross Salary

Enter the employee's gross salary before deductions.

Train. Full Time Gross Salary

If the employee works full time for the training department, enter the gross salary.

If you select the Full-Time Instructor check box on the Instructor page, the payroll system considers that instructor full-time.

Paid Hours

Enter the total number of hours the employee works for the related cost unit. For example, if the cost unit is Pers/Month, then the number of hours is related to one month.

If you selected *Apply on Jobcodes* or *Apply on Employees* enter the number of hours that the employee worked.

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If you selected *Load from Global Payroll* the system displays the value that is retrieved by the Salary Cost Mass Update process. You cannot change the value here.

Job tab

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

Period tab

Period Begin Date This field is used for the effective date and the effective date is always equal to the period begin date.

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

If you have separate costs for Administer Training and Budget Training, the period over which costs apply varies. Administer Training costs cover pay periods, whereas Budget Training costs apply to budget periods, which normally cover a year. Be sure that all these periods are contiguous to ensure accuracy in total compensation.

Calc. Flag (calculate flag) This field identifies the source of the cost information:

Manually, indicates that the employee's cost data was manually entered on this page.

Job Code, Employee, or *Payroll,* indicate that the data was loaded by the Salary Cost Mass Update process that you run from the Update Salary Cost page.

Company Select the employee's company.

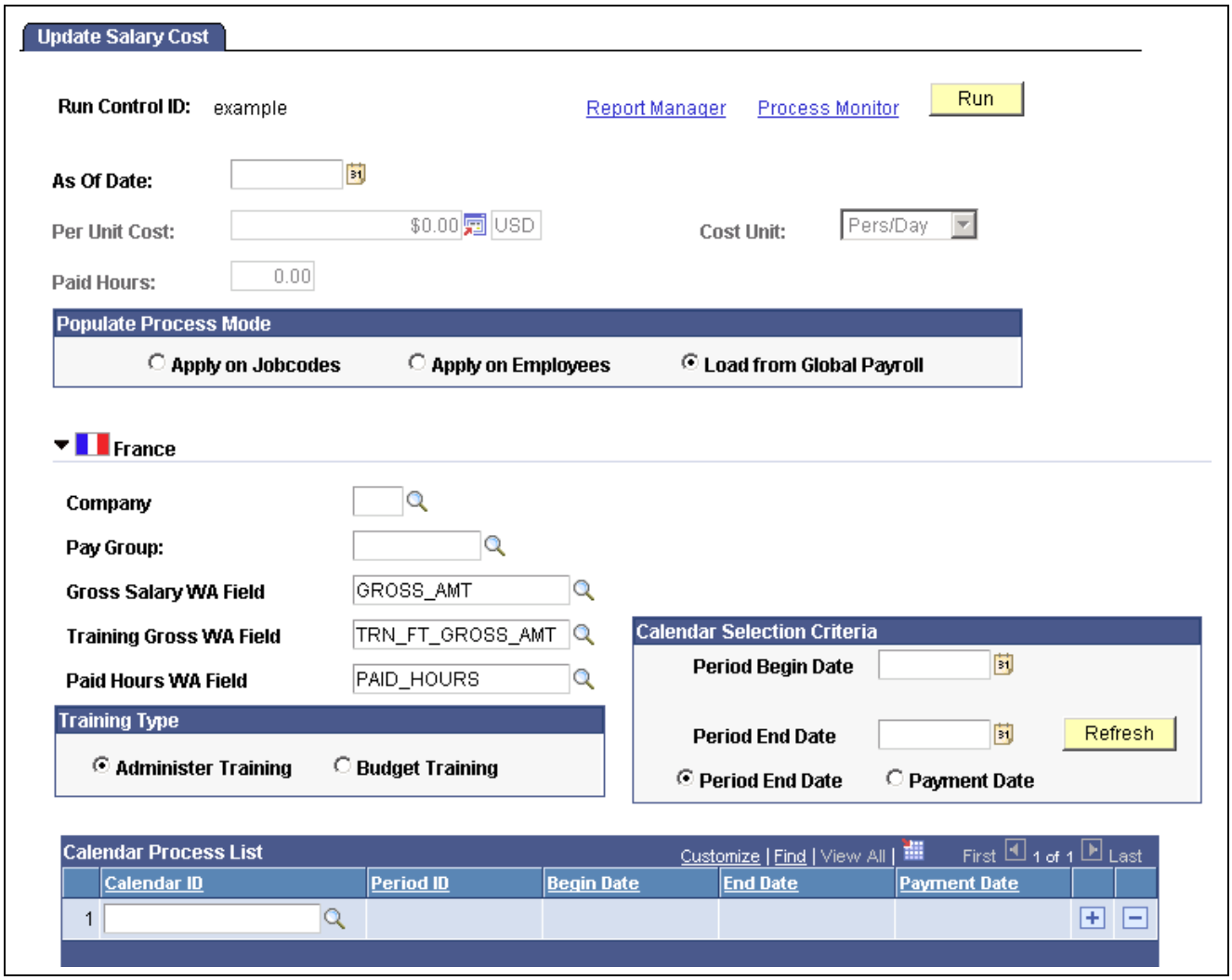
See Also

Chapter 12, "(FRA) Producing the French Training Report 2483," page 221

Processing Training Costs for a Group

Access the Update Salary Cost page.

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Update Salary Cost page

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

As Of Date Enter the effective date for this process. This date is used to Effective Date and Period Begin Date.

Per Unit Cost Enter the cost to use for processing the cost per job or cost per employee.

(FRA) Selecting Load from Global Payroll disables this field.

Populate Process Mode

Apply on Jobcodes Select to apply the cost to employees with a specified job code.

Apply on Employees Select to apply the cost to given employees.

(FRA) Load from Global Payroll Select to apply costs from Global Payroll for France to a group of employees. The system displays the France group box.

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SetID and Jobcode

This group box appears when you select *Apply on Job Code* or *Apply on Employees*. Select the SetID and job code to which you want to apply the selected cost. Add as many SetIDs and job codes as necessary.

(FRA) France

This section becomes available when you select *Load from Global Payroll*.

In Global Payroll for France, writable array elements are used to store payroll results. The payroll system computes the salary and paid hours for training, and uses the writable array, FOR WA 2483, to store the results in the GPFR_TRN_WA record. When you run the Update Salary Costs process, salaries and paid hours are imported from the writable array.

This is a single table which interfaces between the payroll system and the training business process. When using a payroll system other than PeopleSoft, the table can be used to import salaries into the training business process.

See *PeopleSoft Enterprise Global Payroll for France 9.0 PeopleBook*, "Understanding Vacation Accruals".

Calendar Selection Criteria

In this group box, define the criteria for selecting the payroll calendars

Period Begin Date Select the period begin date for salary training costs, usually the beginning of the fiscal year.

Period End Date Select the period end date for salary training costs, usually the end of the fiscal year.

Period End Date and **Payment Date** Select the date that signifies the end of the period.

Refresh Click to have the system insert all payroll calendars that occur within the specified period into the Calendar Process List

Calendar Process List

Calendar ID Select a Calendar ID that defines the time range in which salary costs are being defined.

Period ID The system enters a Period ID for the salary costs being calculated during this time range.

See Also

PeopleSoft Enterprise Global Payroll 9.0 PeopleBook

PeopleSoft Enterprise Global Payroll for France 9.0 PeopleBook

PeopleTools PeopleBook: PeopleSoft Process Scheduler

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Defining Training Budget Periods and Department Allocations

To define budget periods, use the Budget Period Table (BUDGET_PERIOD_TBL) component. To allocate budget amounts by department, use the Department Budget (TRN_BUDGET_TBL) component.

This section provides an overview of budget period and allocations and discusses how to:

- Define budget periods.
- Allocate budgets to departments.

Understanding Budget Periods and Department Allocations

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

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

After you establish budget periods, you can allocate a budgeted amount to each department. You can then see how the estimated training costs that are based on department training demand compare to a department's allocated training budget.

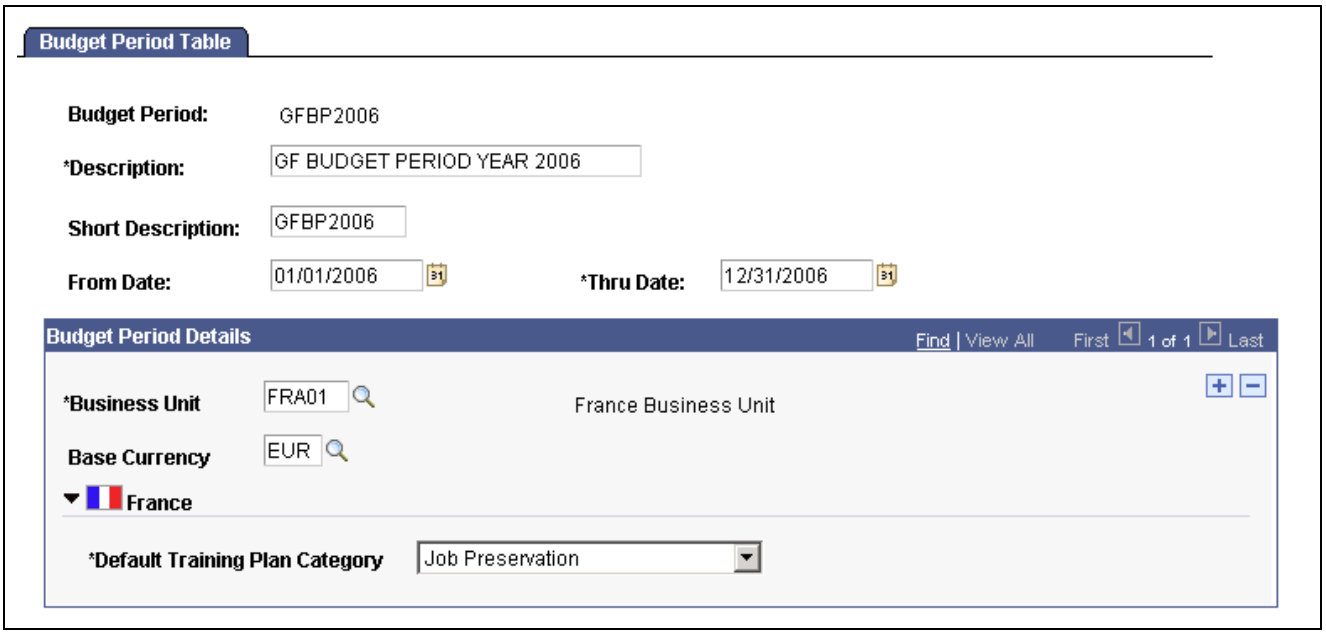
Pages Used to Set Up Training Budget Periods and Department Allocations

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

Defining Budget Periods

Access the Budget Period Table page.

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Budget Period Table page

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

From Date and **Thru Date** (through date)

Enter the begin and ends dates for the budget period.

Important! Course sessions must fall within the budget period that is to be included in the budget. A course session cannot span two budget periods.

Budget Period Details

Business Unit

Select the business units to which the budget period applies.

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

Base Currency

Specify the base currency to be used to track all cost amounts.

(FRA) Default Training Plan Category

The category that you select here becomes the default training plan category when you create training demands.

Values are: *Skill Development, Adaptation to Job Changement, Job Preservation,* and *Not Specified*.

See Also

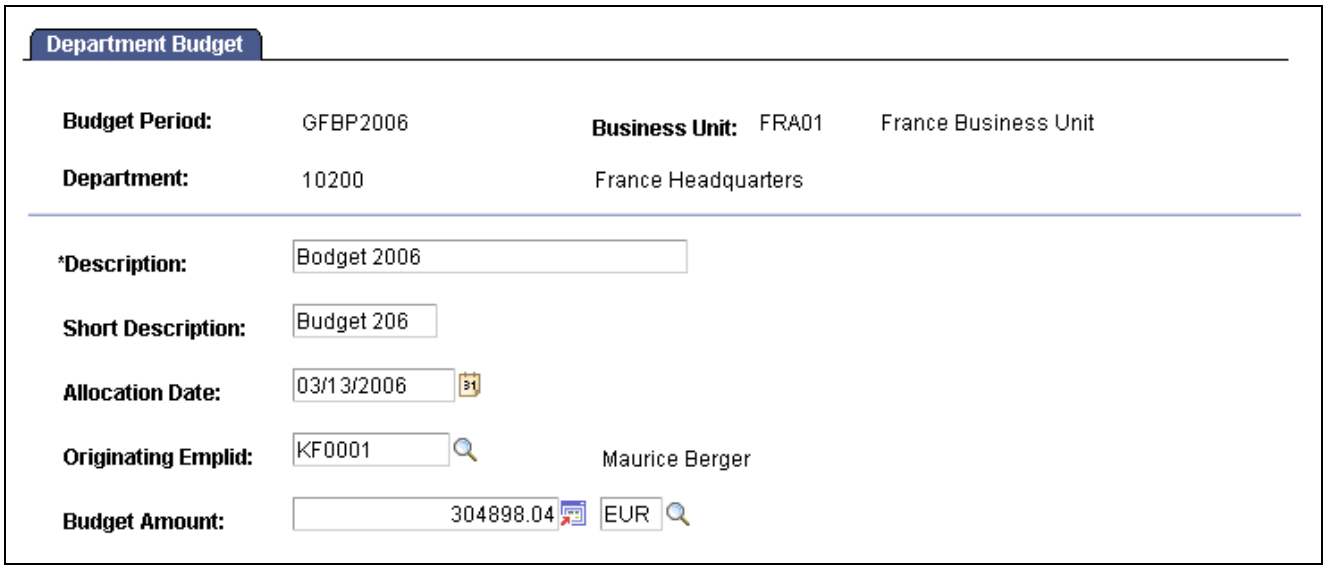
Chapter 3, "Setting Up Training Costs," Selecting the Base Currency for Training Costs, page 42

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Defining Business Units

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Allocating Budgets to Departments

Access the Department Budget page.



Department Budget page

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

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

Budget Amount Enter the budgeted amount and the currency to use when you compare the actual and budget costs by department. The system uses the selected currency as the default value on pages where the Budget Training process calculates department budget costs to ensure that costs and budget are in the same currency.

See Also

Chapter 3, "Setting Up Training Costs," Selecting the Base Currency for Training Costs, page 42

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CHAPTER 4

Defining Training Requirements

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

- Create demand profiles.
- Define profiles by criteria.
- Define general training demands.
- Define departmental training demands.
- Define employee training demands and demand by course.

Understanding Training Demand

This section lists common elements and discusses:

- Training demands and budgets.
- Demand profiles.
- Methods of determining training demand.
- Department trees.

Common Elements Used in This Chapter

Creation Date If you're creating a new department demand, enter the creation date. The default is the system date, which you can change.

Demand ID The system displays *NEW* when you create a demand for the first time. You can accept the system-generated ID or enter a new ID. The system generates a sequence number based on the last demand ID that was stored in the Installation table.

Demand Priority Values are *Low, Medium,* and *High.* When you're building global scenarios using the Create Global Scenario processes, you can specify that the system include only demands that have a certain demand priority.

See Chapter 5, "Planning Training Budgets," Creating Global Scenarios, page 95.

Expiration Date Enter the last possible date for meeting the training demand. This field is for information only, but it can be useful if you decide to mark a demand as obsolete after a specific time.

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From Date and **Thru Date**	Displays the beginning (from) and ending (through) dates of the budget period, which you entered when you opened the page.
Frozen	Automatically selected if the budget period is frozen. If you try to modify this page, you get a warning message.
OrigEmplID (originating employee ID)	Select the employee ID of the person who created the demand.
Originator	Select the demand originator's position. Values are *Employee* and *Supervisor*.
Revision Date	Enter a revision date to indicate when the demand profile was edited.

Training Demands and Budgets

Creating a realistic training budget requires that you determine how much training to provide to your workforce. When you know the demand for training—how many employees need or want training—you can figure out the cost, compare it to the proposed training budget, and adjust the budget or the number of employees who can take courses.

Methods of Determining Training Demand

Four methods are available for establishing training demand, as shown in the following table:

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

Note. Demand is established for a particular budget period.

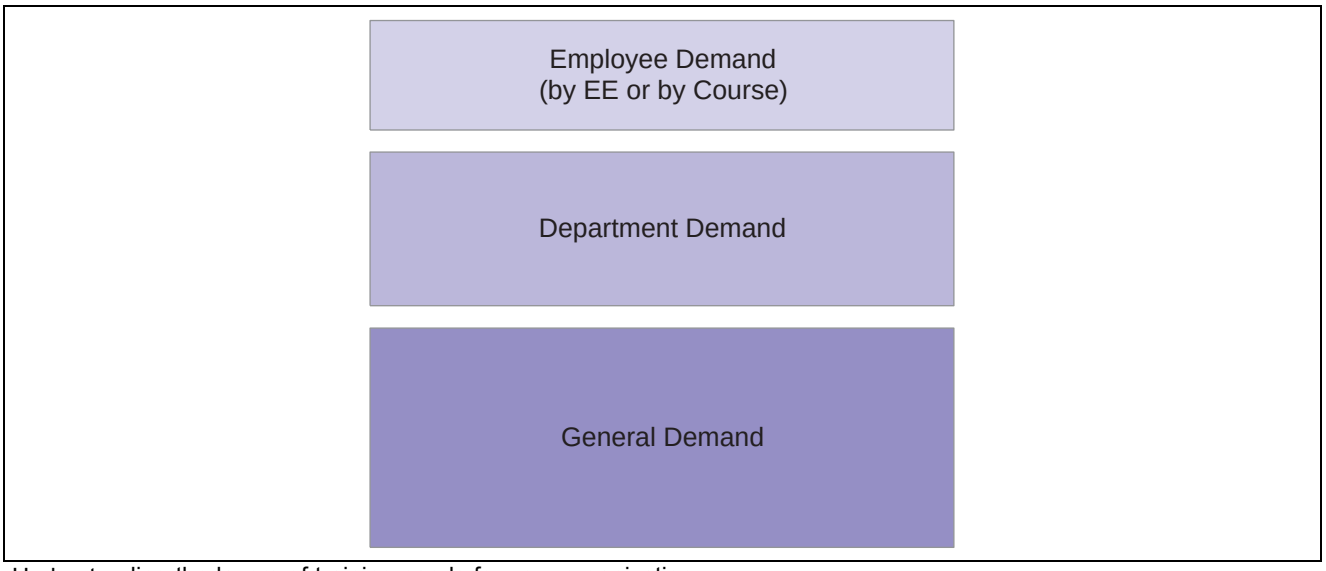
Using these methods, you can:

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

  For example, you can define general demands only and not work with departmental or employee demands. You can set up training budget scenarios and develop a training plan using just one method or all four methods. If you work in a decentralized way, departmental- or employee-level demand forecasting works best. If you work in a centralized way, global-level forecasting works best.
- Determine the costs that are associated with a demand for training in a particular course—not just how many employees need the training, but the cost to your organization in terms of wages or lost billable time.

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This diagram shows the layers of training needs:



Understanding the layers of training needs for your organization

For each type of demand, you define:

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

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

Demand Profiles

To determine training demand, you build profiles of employees with similar qualities who need to take the same training courses. A demand profile is a template that defines a set of criteria for selecting employees. For example, if managers in your Customer Support department must take the Time Management course, the demand profile would include the Customer Support department and manager job code as selection criteria.

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

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

See Also

Chapter 4, "Defining Training Requirements," Creating Demand Profiles, page 65

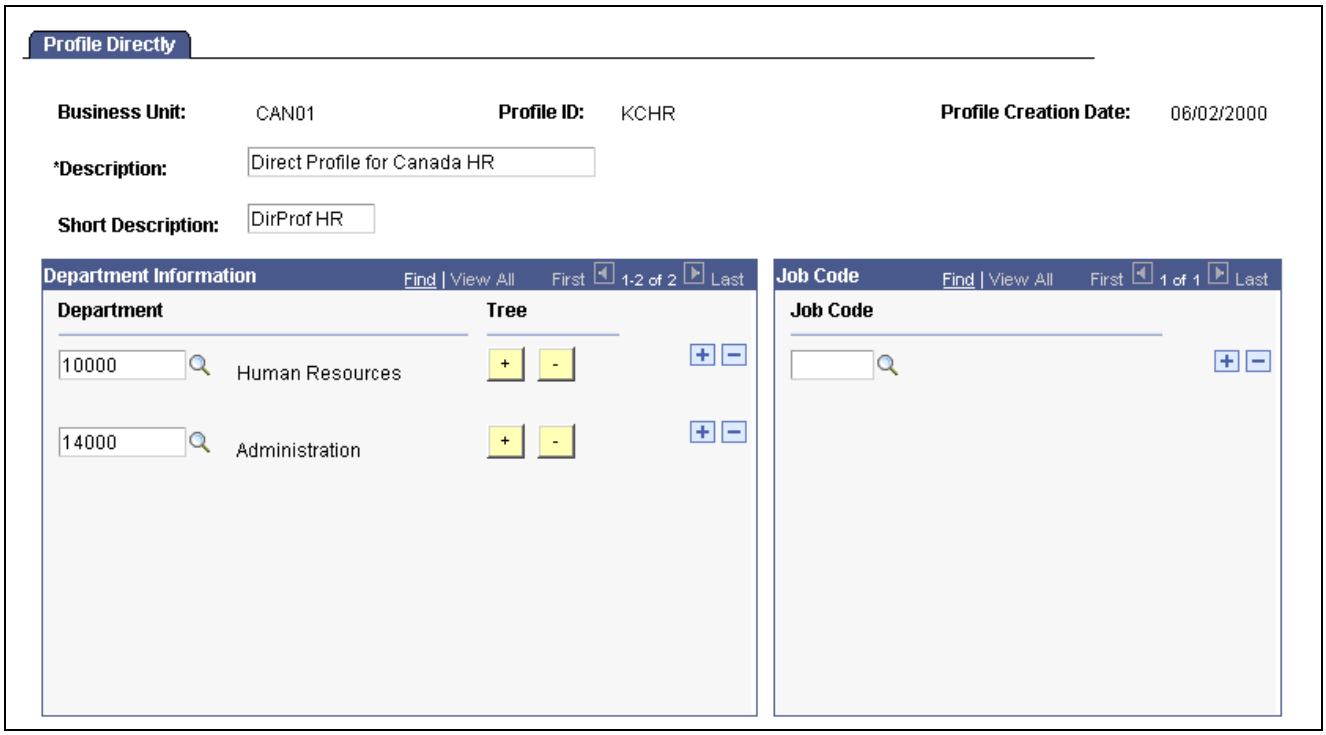
Department Trees

When you use training budget components, such as demand profiles or department demands that reference department information, you can use a department security tree.

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

This example shows using the department tree to populate department:



Example page using department tree to populate department



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



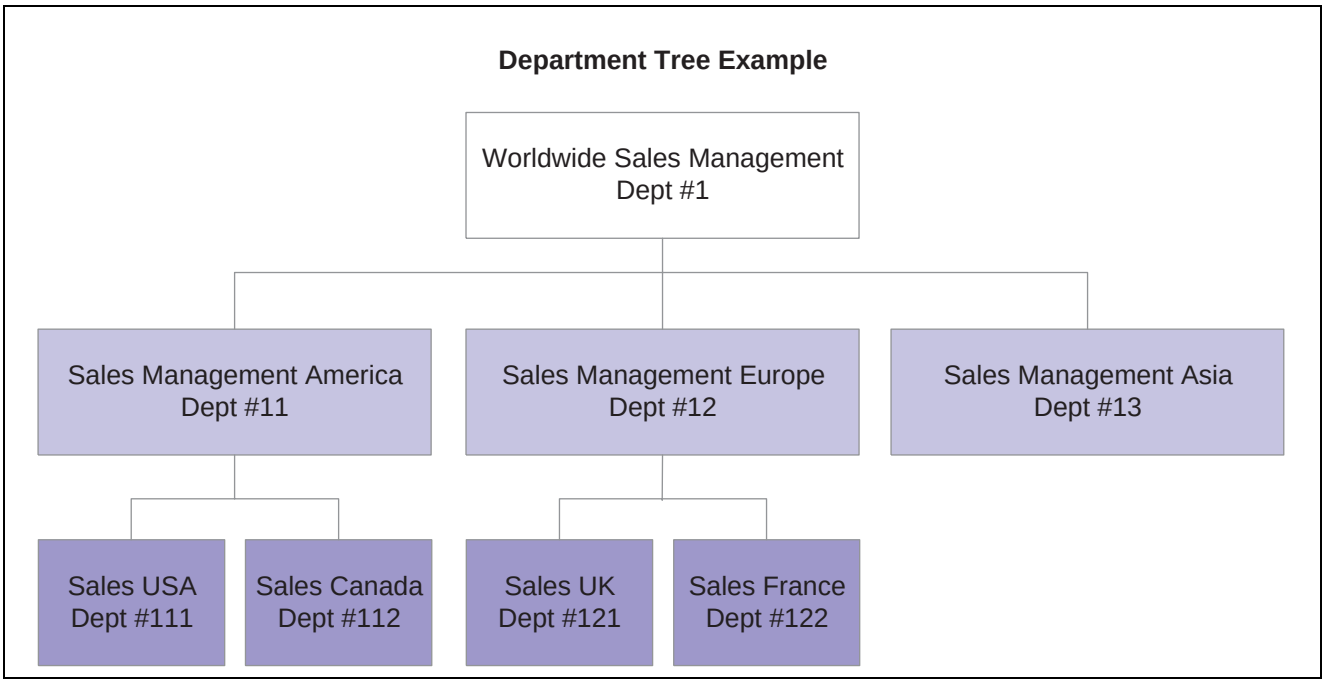
Click the Collapse button to delete related departments from the list. The system deletes only the departments that you added by clicking the Expand button. Departments that you added manually remain in the list, even if they are related departments.

Instead of using the Expand and Collapse buttons, you can enter departments manually by inserting a department row.

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

This flowchart illustrates an expanded department tree:

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Expand department tree example

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

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Creating Demand Profiles

To create demand profiles, use the Directly (TRN_PROFILE_CREATE) and the By Criteria (TRN_PROFILE_TABLE) components.

This section provides an overview of dynamic and static demand profiles and discusses how to:

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

Understanding Dynamic and Static Demand Profiles

Use demand profiles to define employee selection criteria for group demands. This demand profile becomes a template that you can reuse as you reassess training demands.

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

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- Dynamic

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

- Static

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

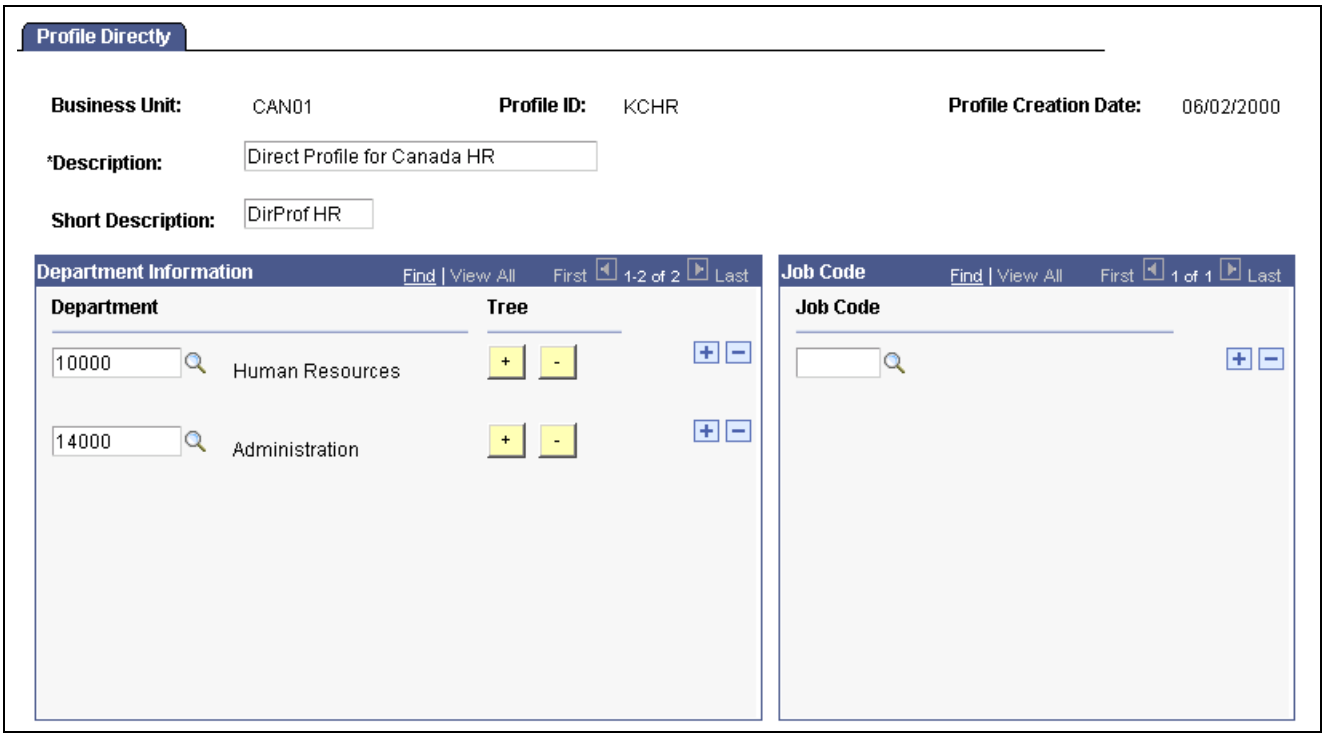
Pages Used to Set Up Demand Profiles

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

Creating Dynamic Profiles

Access the Profile Directly page.

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Profile Directly page

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

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

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

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

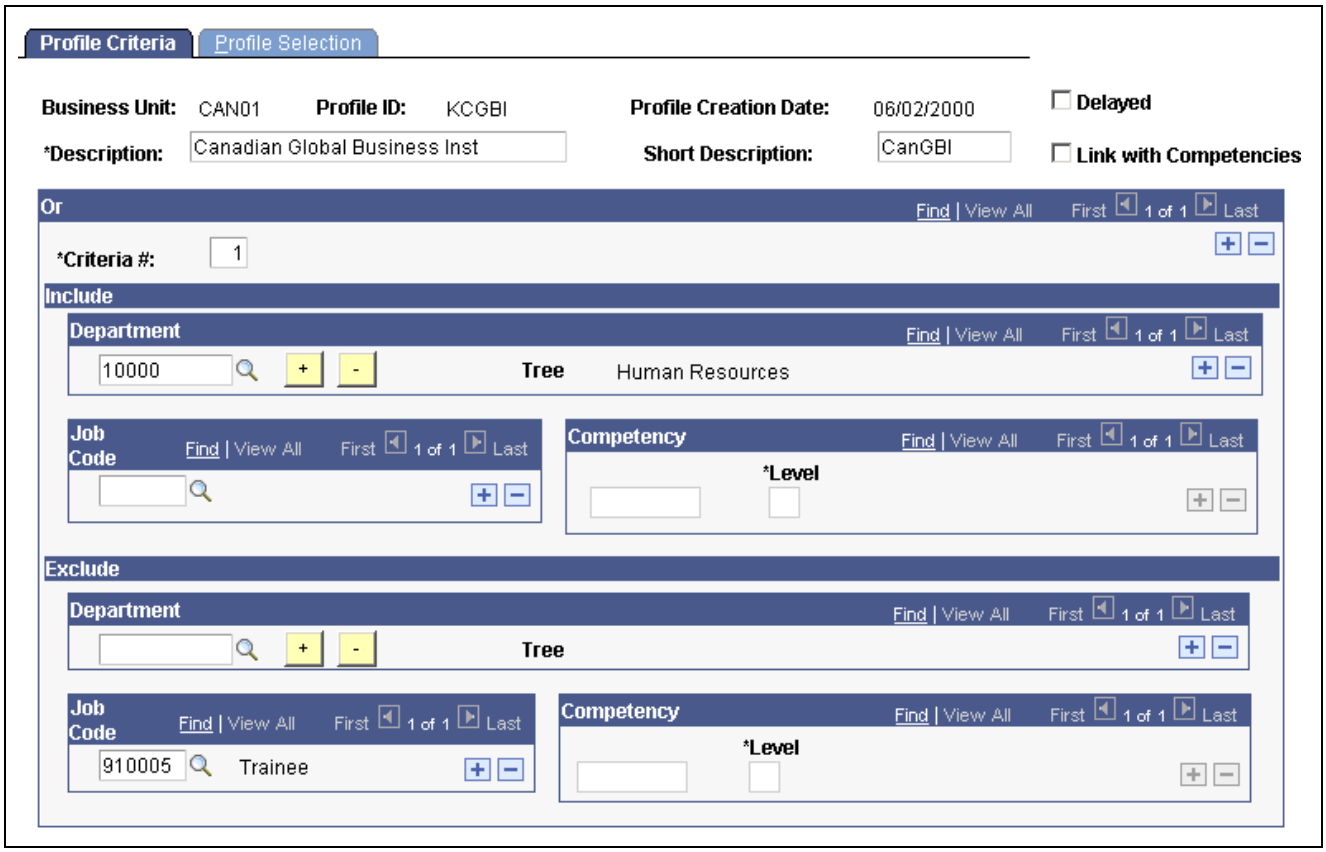
See Also

Chapter 4, "Defining Training Requirements," Department Trees, page 63

Creating Static Profiles

Access the Profile Criteria page.

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Profile Criteria page

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

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

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

Delayed Select to delay processing the demand profile until later. If this check box is cleared, the system executes the profile criteria when you save the page. Before starting to gather the employees who match the profile template, the system displays a message about the process.

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

Link with Competencies Select to include competencies in the selection criteria. When selected, the system makes the Competency fields available and enables the competency search criteria. To include competencies in the selection criteria, set up competency codes in the Content Catalog.

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Or

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

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

Enter a new criteria number to define an additional profile criteria statement.

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

Include and Exclude

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

Competency, Level Select the competency to include in or exclude from the profile. Select a competency rating in the Level field. When you complete the competency fields, the system includes or excludes workers with competencies at the rating that you specified.

You define competency codes in the Content Catalog and the associated rating levels on the Rating Model table.

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

See Also

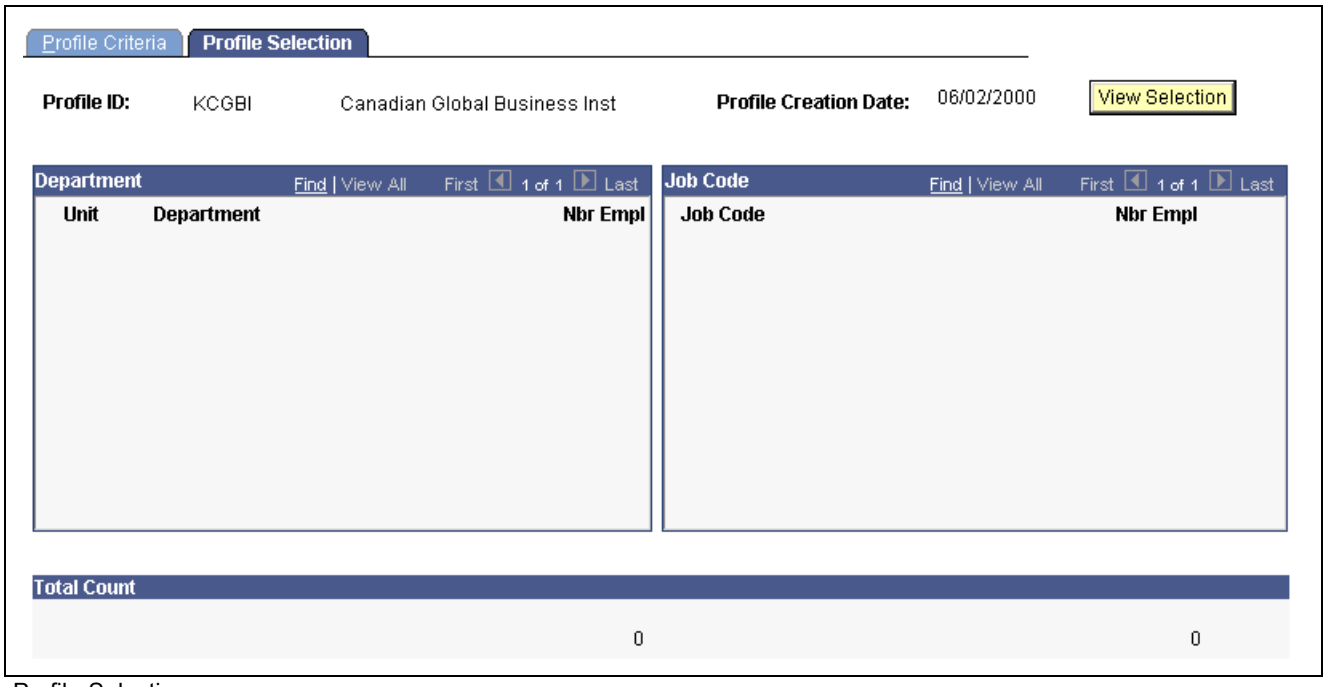
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"

Chapter 4, "Defining Training Requirements," Department Trees, page 63

Viewing Selection Results

Access the Profile Selection page.

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Profile Selection page

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

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

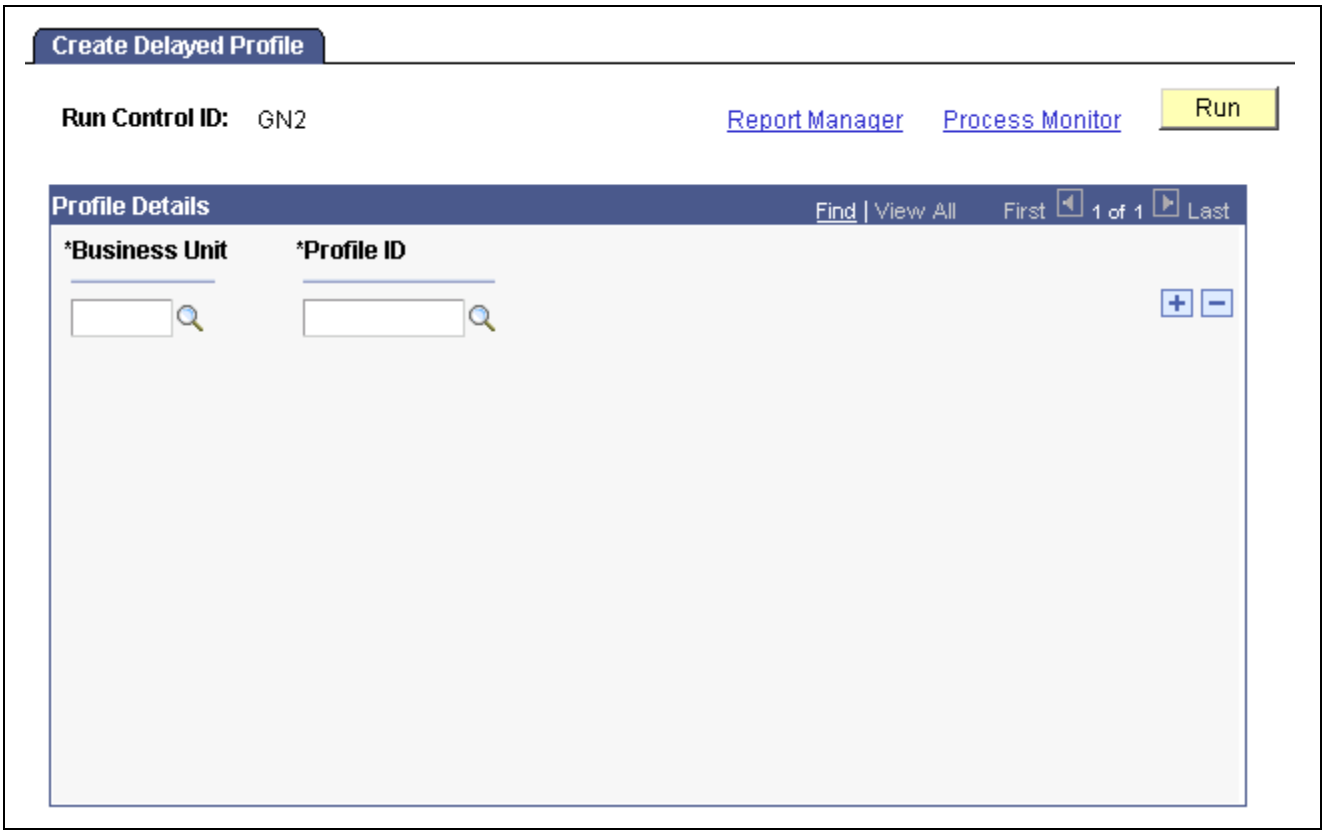
Nbr Empl (number of employees) Displays the number of employees that match department profile criteria. If you entered more than one department in the selection criteria, then the system displays the number of matching employees for each department code.

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

Running the Process to Create Demand Profiles

Access the Create Delayed Profile page.

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Create Delayed Profile page

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

Run Click to run the Create Delayed Profile process.

Defining General Demands

To define general (global) demands, use the General Demand (TRN_DEMAND_TABLE) component.

This section discusses how to:

- Define training needs.
- Specify the group that needs training.
- Specify a demand profile.
- Enter country-specific information for a general demand.

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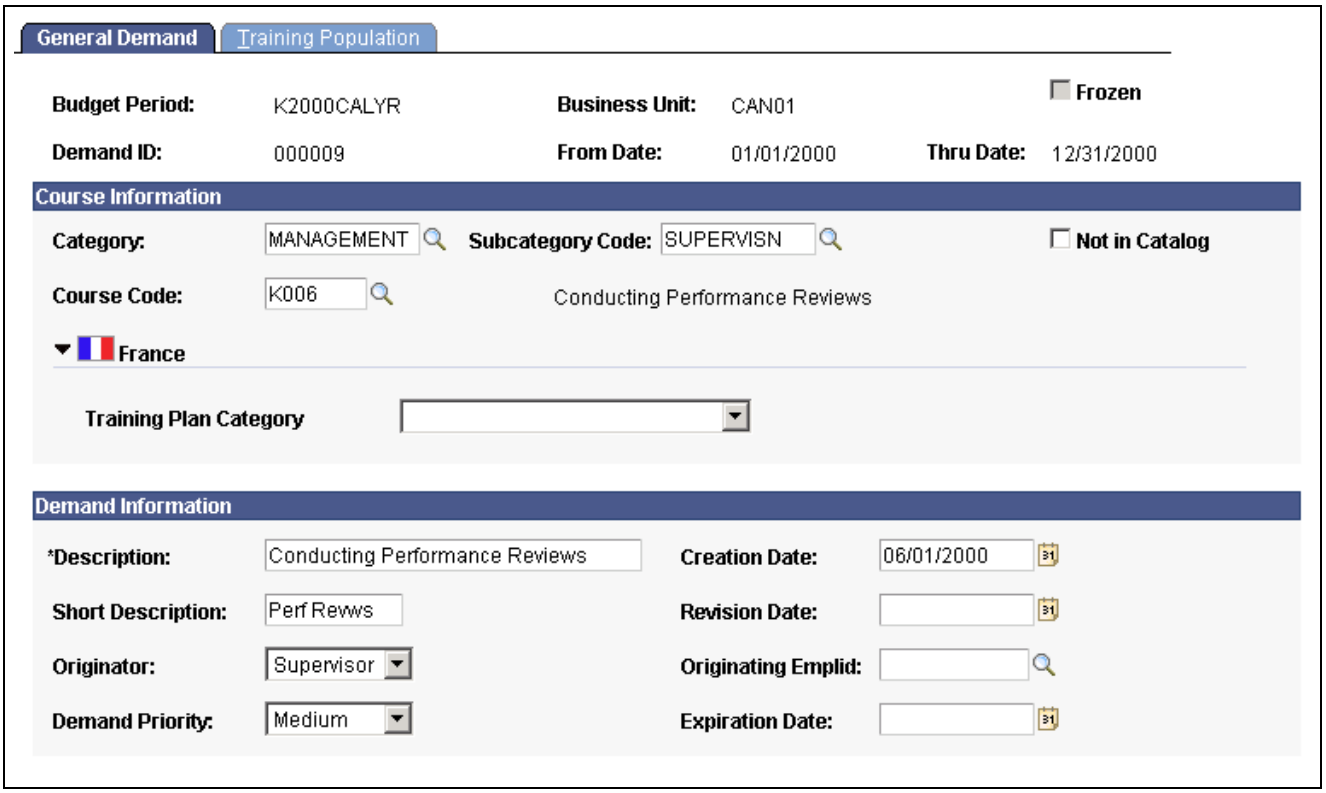
Pages Used to Define General Training Demands

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

Defining General Demand Information

Access the General Demand page.

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General Demand page

Course Information

Category, Subcategory, and **Course Code**

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

Note. You must select a category before you can select a subcategory.

Not in Catalog

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

(FRA) Training Plan Category

Select a training plan category.

The values are: *Skill Development, Adaptation to Job Changement, Job Preservation,* and *Not Specified.*

Demand Information

Description and **Short Description**

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

See Also

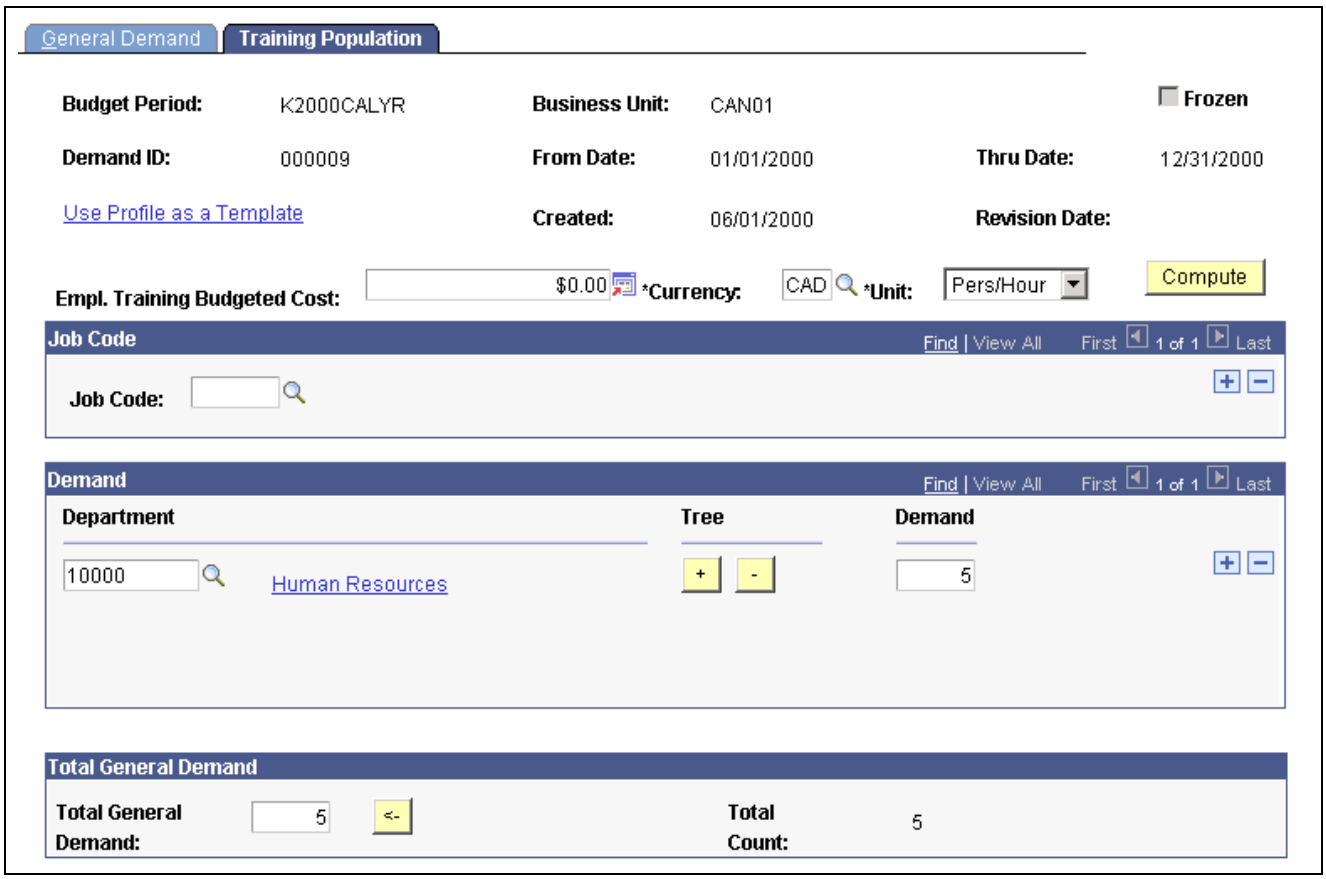
Chapter 5, "Planning Training Budgets," Creating Global Scenarios, page 95

Chapter 5, "Planning Training Budgets," Freezing Budgets, Moving Unapproved Demands, and Deleting Scenarios, page 107

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Defining the Group That Needs Training

Access the General Demand - Training Population page.



General Demand - Training Population page

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

Use Profile as a Template

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

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

Empl. Training Budgeted Cost (employee training budgeted cost)

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

Employee Training Budgeted Cost = (job code training cost × number of people in this job code) for all job codes in the Job Code field on this page / total number of people in the general demand.

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

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

Job Code

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

Demand

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

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

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

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

Total General Demand

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



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

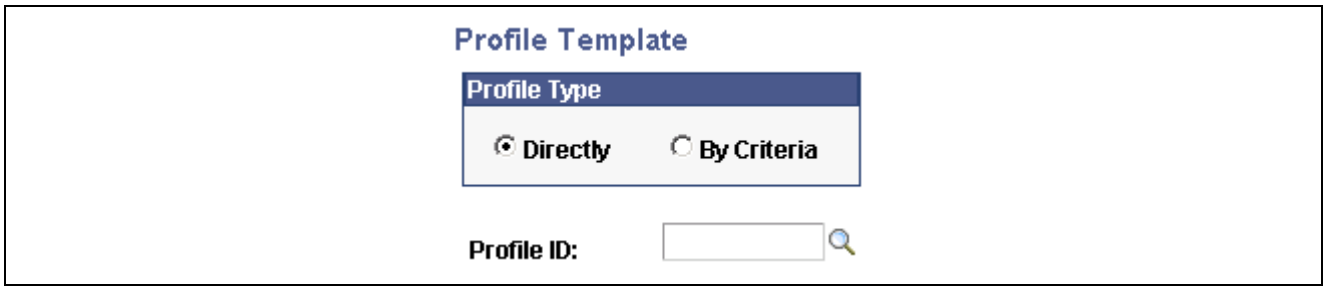
See Also

Chapter 4, "Defining Training Requirements," Department Trees, page 63

Specifying a Demand Profile

Access the General Demand - Profile Template page.

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General Demand - Profile Template page

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

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

Profile ID Select the demand profile to apply.

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

Entering Country-Specific Information for Global Demand

Access the General Demand - Country page.



General Demand - Country page

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(FRA) France

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

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

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

Defining Departmental Training Demands

To define departmental demand, use the Department Demand (TRN_DEMAND_DEPT) component.

This section discusses how to define the number of employees in a department.

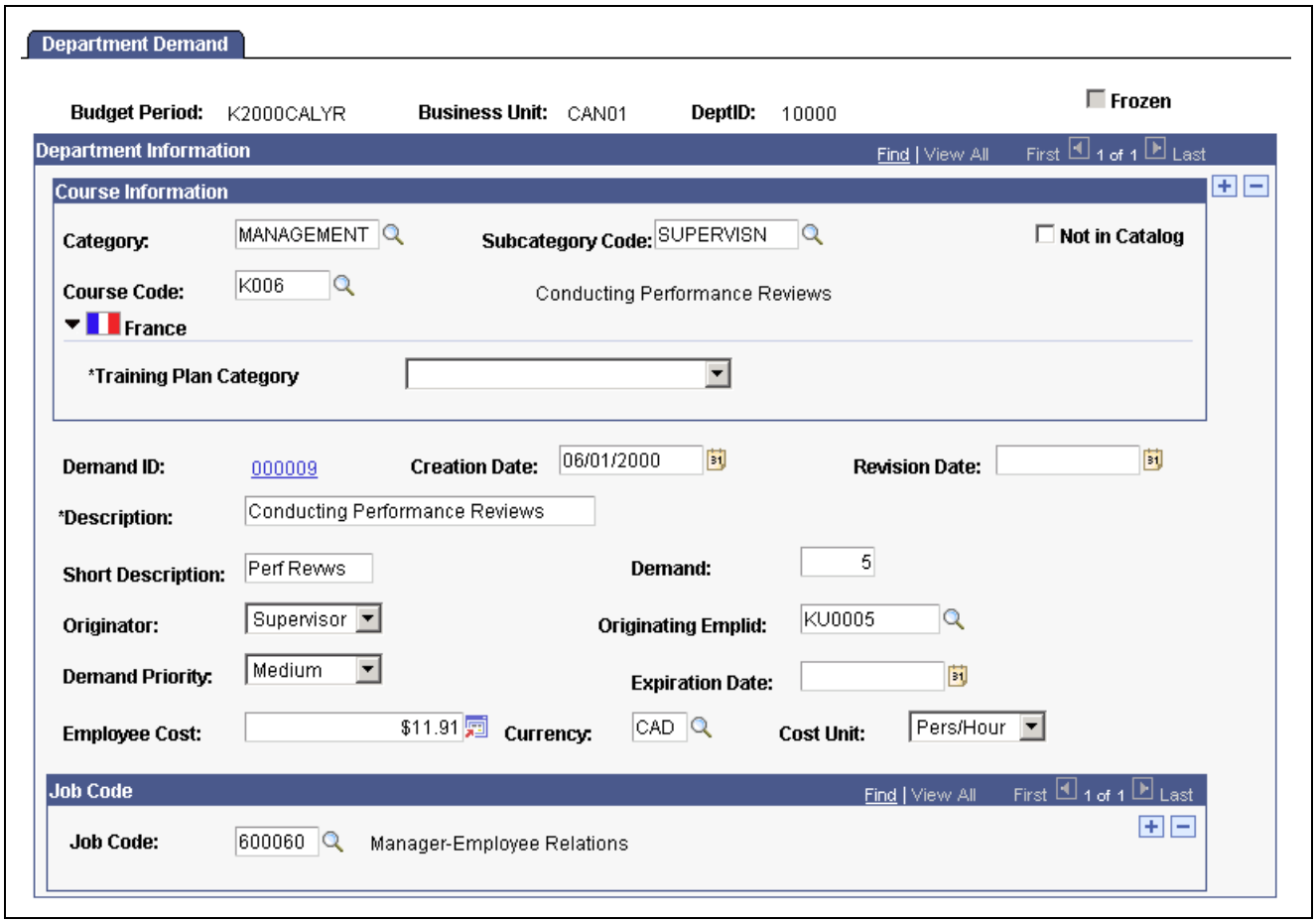
Pages Used to Define Departmental Training Demands

Page Name	Object Name	Navigation	Usage
Department Demand	TRN_DEMAND_DEPT	Enterprise Learning, Training Budget, Identify Training Demand, Department Demand, Department Demand	Define the number of employees to be trained in a specific course or set of courses for a particular department during a specified budget period. Set up training costs and budgets before setting up department demands.
Department Demand - Country	TRN_DPT_DMD_SEC1	Click the Demand ID link on the Department Demand page.	Enter country-specific information for the department demand. The Department Demand - Country page is identical to the General Demand - Country page.

Defining the Number of Employees in a Department

Access the Department Demand page.

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Department Demand page

Course Information

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

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

Training Plan Category Select a training plan category.

The values are: Skill Development, Adaptation to Job Changement, Job Preservation, Not Specified.

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

Employee Cost Enter the employee training cost and the currency it is tracked in. This cost is used during the simulation for pricing the scenarios and the training plan.

You specify the default currency for business units for a budget period on the Budget Period Table page. Budgets are automatically converted to the default base currency that you establish on the Base Currency page.

Cost Unit Select the cost unit that is associated with the amount in the Employee Cost field.

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Job Code Before calculating employee cost, you can select one or more job codes to use when calculating the average employee cost for training for this demand. When you select job codes here, the system uses the Job Code Training Cost amount on the Job Code Training Cost table to calculate the employee training cost. The system takes an average of the costs for all job codes that you specify.

See Also

Chapter 5, “Planning Training Budgets,” Creating Global Scenarios, page 95

Defining Employee Training Demands and Demand by Course

To define employee training demand, use the Employee Demand (TRN_EE_DEMAND) and the Employee Demand (TRN_EE_DEMAND_CRSE) components. This section discusses how to:

- Specify courses for an employee.
- Enter additional employee demand details.
- Specify employee demand by course.
- Enter additional employee details by course.

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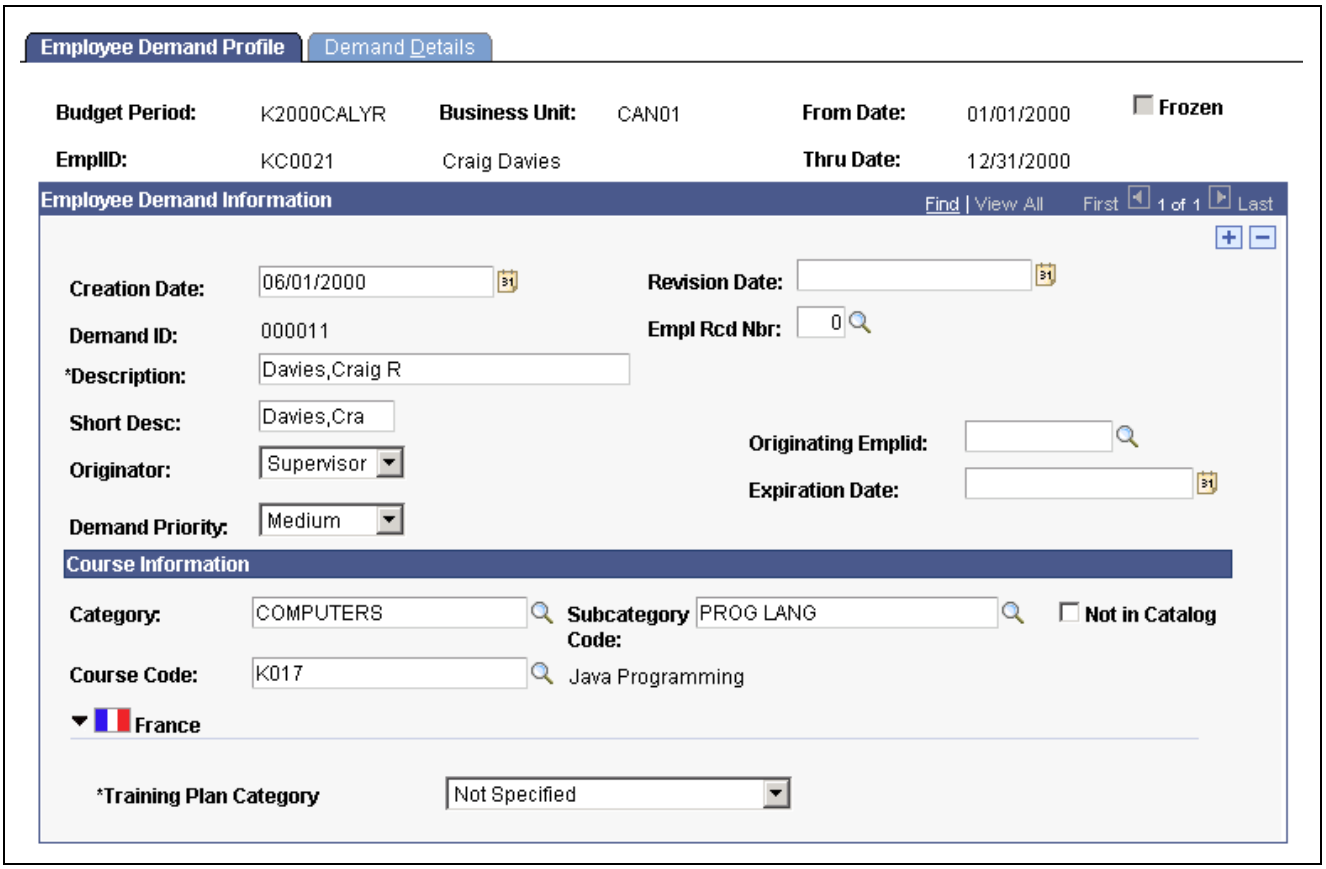
Pages Used to Define Employee Training Demand and Demand by Course

Page Name	Object Name	Navigation	Usage
Employee Demand - Employee Demand Profile	TRN_DEMAND_EE_1	Enterprise Learning, Training Budget, Identify Training Demand, Employee Demand	Enter the courses that the selected employee requires during the budget period set up on the Budget Period Table page. Enter audit information for the demand.
Employee Demand - Demand Details	TRN_DEMAND_EE_2	Enterprise Learning, Training Budget, Identify Training Demand, Employee Demand	Enter additional employee demand details, including job code, department, and training costs.
Employee Demand by Course	TRN_DEMAND_EECRS_1	Enterprise Learning, Training Budget, Identify Training Demand, Employee Demand by Course	Define the employees who require the selected training course and enter audit information for the demand.
Employee Demand by Course - Demand by Course Details	TRN_DEMAND_EECRS_2	Enterprise Learning, Training Budget, Identify Training Demand, Employee Demand by Course, Demand by Course Details	Enter additional employee details by course. For example, an employee will transfer to another department or job code during the budget period, and the training need should be allotted to the new department, then you can account for that change here.

Specifying Courses for an Employee

Access the Employee Demand - Employee Demand Profile page.

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Employee Demand - Employee Demand Profile page

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

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

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

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

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

Not in Catalog

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

Training Plan Category

Select a training plan category.

The values are: *Skill Development*, *Adaptation to Job Changement, Job Preservation, Not Specified.*

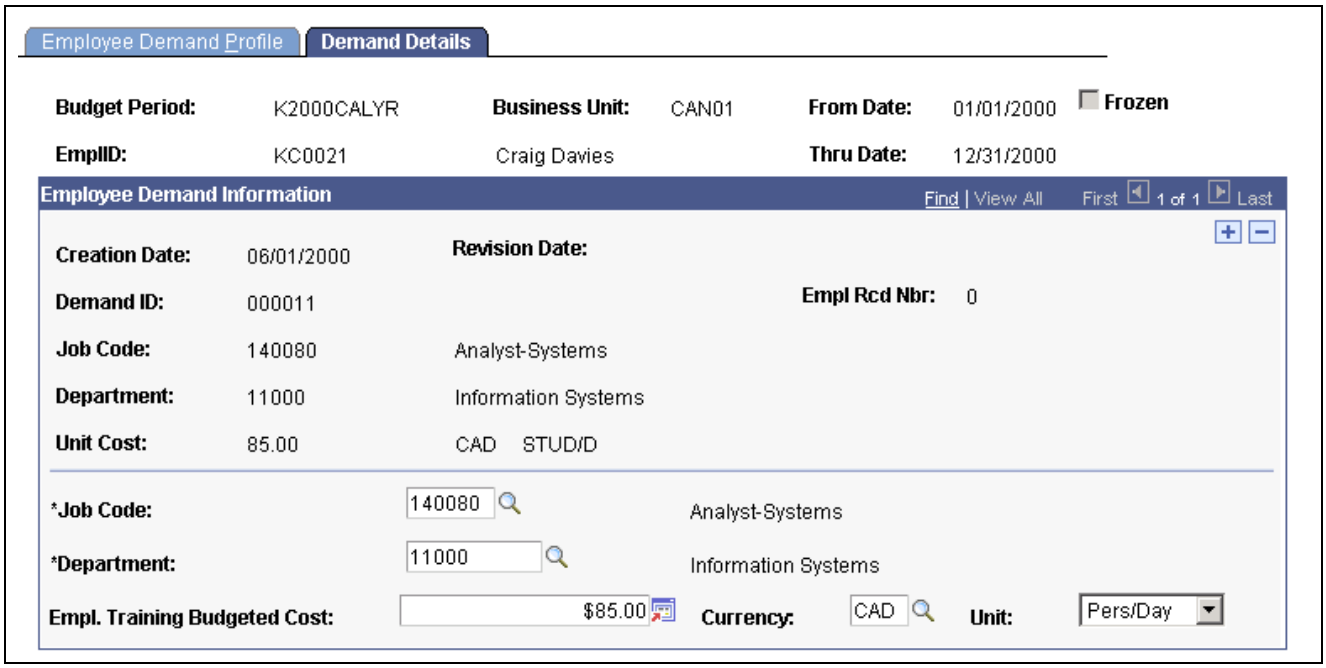
See Also

Chapter 5, "Planning Training Budgets," Creating Global Scenarios, page 95

Entering Additional Employee Demand Details

Access the Employee Demand - Demand Details page.

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Employee Demand - Demand Details page

Job Code, Department, and **Empl. Training Budgeted Cost** (employee training budgeted cost)

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

For employee training budgeted cost, indicate the currency that the cost is tracked in.

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

Unit

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

Select the cost unit for the cost that you entered in the *Per Unit Cost* fields. The Compute Student Cost process uses the Cost Unit field to divide the cost against the students' training session. Values are:

Flat Cost: The cost is a fixed rate, it is not dependent on the course session duration.

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

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

Pers/Month: The cost is the employee's monthly wage.

Pers/Train: The cost unit may be useful to enter a cost that is not converted by the computation process. The Paid Hours field is non applicable and disabled when this cost unit is selected.

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Pers/Week: The cost is the employee's weekly wage.

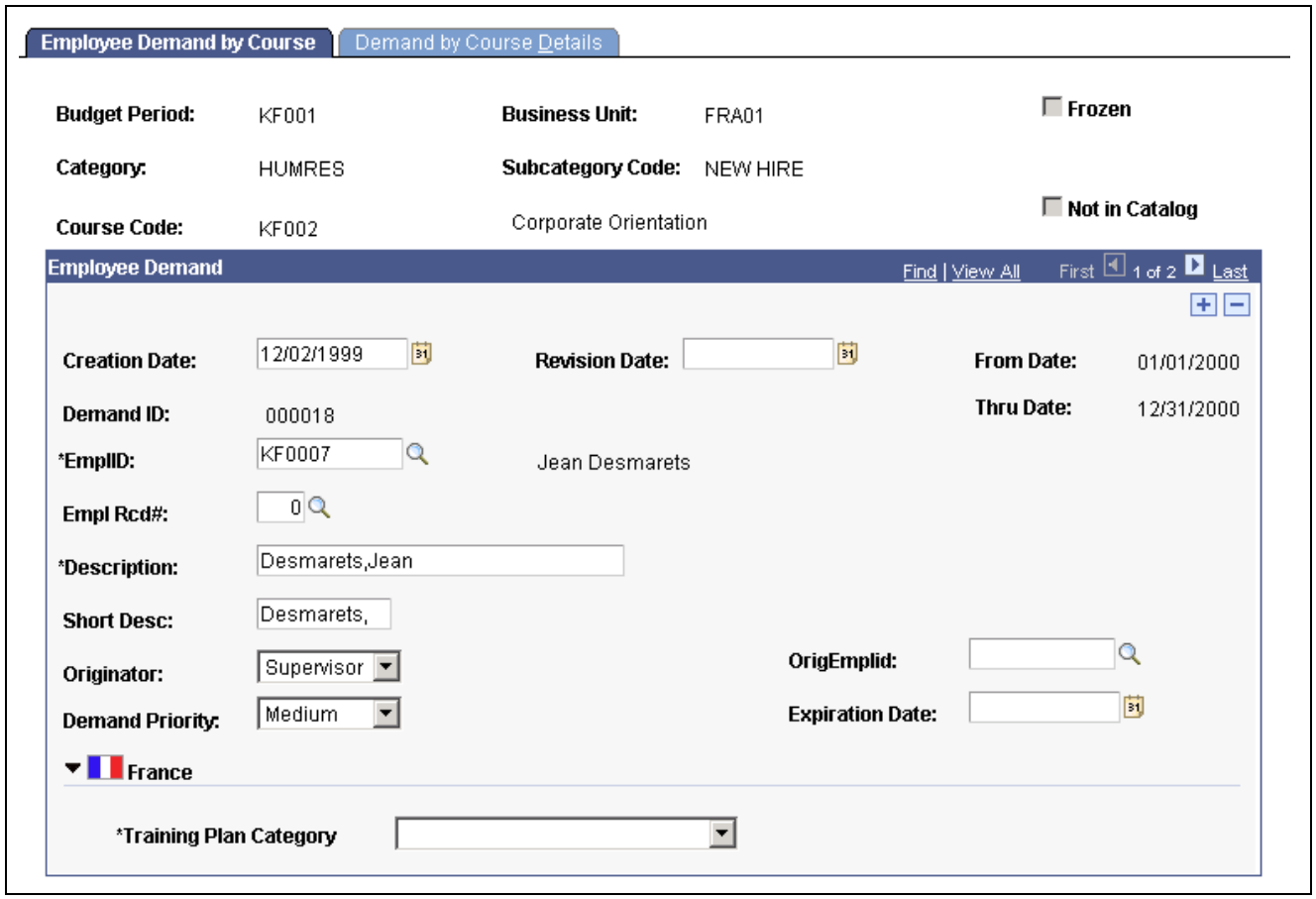
Pers/Year: The cost is the employee's yearly wage.

See Also

Chapter 3, "Setting Up Training Costs," Selecting the Base Currency for Training Costs, page 42

Specifying Employee Demand by Course

Access the Employee Demand by Course page.



Employee Demand by Course page

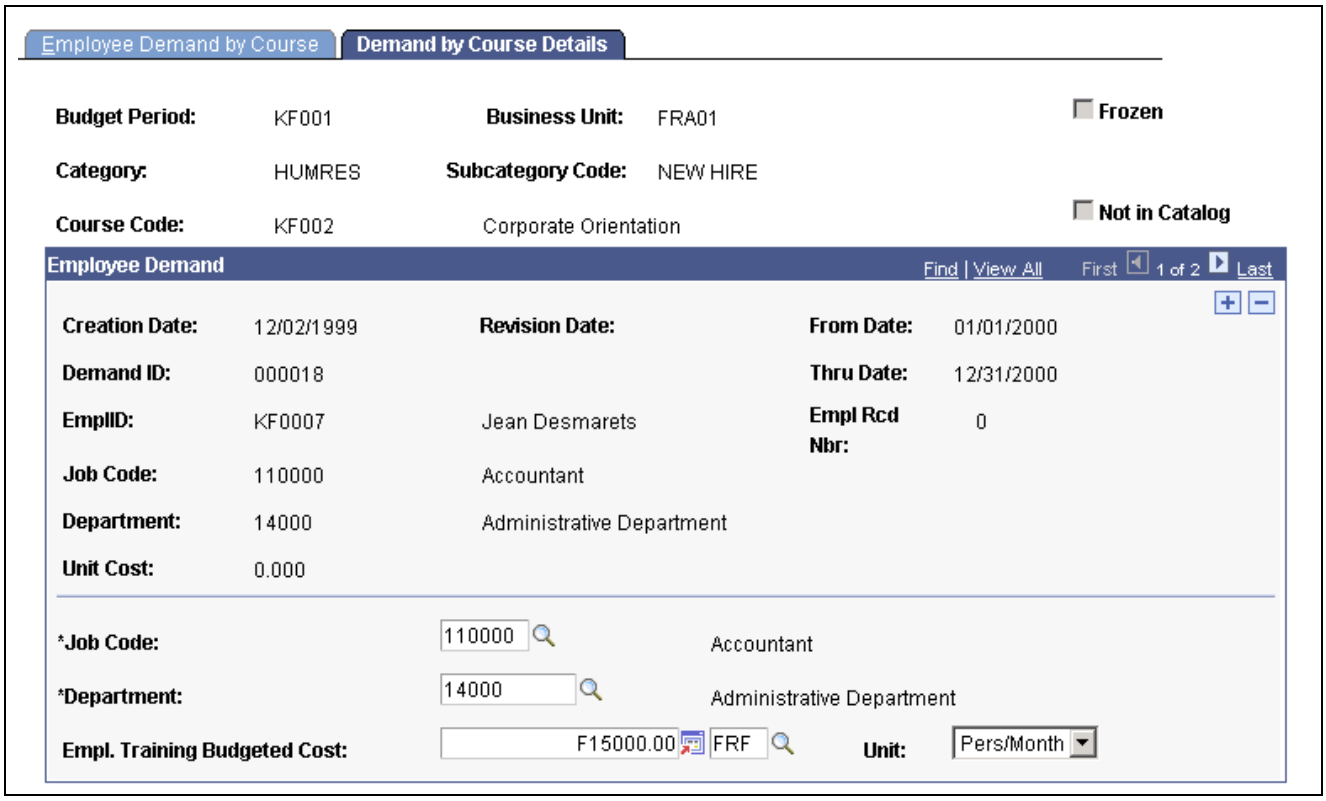
Not in Catalog Selected by default if the training course hasn't been defined in the Catalog table.

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

Entering Additional Employee Details by Course

Access the Employee Demand by Course - Demand by Course Details page.

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Employee Demand by Course - Demand by Course Details page

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

Unit Select the cost unit for the cost that you entered in the *Per Unit Cost* fields. The Compute Student Cost process uses the Cost Unit field to divide the cost against the students' training session. Values are:

- *Flat Cost:* The cost is a fixed rate, it is not dependent on the course session duration.
- *Pers/Day:* The cost is based on what the employee earns in a day.
- *Pers/Hour:* The cost is the employee's hourly wage.
- *Pers/Month:* The cost is the employee's monthly wage.
- *Pers/Train:* The cost unit may be useful to enter a cost that is not converted by the computation process. The Paid Hours field is non applicable and disabled when this cost unit is selected.
- *Pers/Week:* The cost is the employee's weekly wage.
- *Pers/Year:* The cost is the employee's yearly wage.

See Also

Chapter 5, "Planning Training Budgets," The Scenario Process, page 86

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CHAPTER 5

Planning Training Budgets

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

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

Understanding the Training Budget Planning Process

This section lists common elements and discusses:

- Budget scenarios
- The scenario process

Common Elements Used in This Chapter

Active New Scenario Select to make the scenario active.

Note. Only one scenario can be active for each budget period and business unit, though you can have multiple scenarios.

New Scenario Enter the name of the new scenario. The name can be up to ten characters.

Not in Catalog Select if the course isn't in the Catalog table.

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

Demand: Sorts demands by the number of requested demands.

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

Budget Scenarios

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

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

Using budget scenarios, you can:

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

  This plan defines the training plan for the related period.

The Scenario Process

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

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

Department and Global Scenarios

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

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

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

Freezing Scenarios

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

Training Element Costs

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

- TRN_PROV_COST (Provider costs).
- TRN_FACIL_COST (Facility costs).
- TRN_EQUIP_COST (Equipment costs).
- TRN_INSTRC_COST (Instructor costs).
- TRN_EXPNS_COST (Expense costs).
- TRN_CST_ELEMENT (Cost Element Table).

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

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

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

Session Padding Determines Session Demand

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

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

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

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

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

1. You add five students to the budget plan.

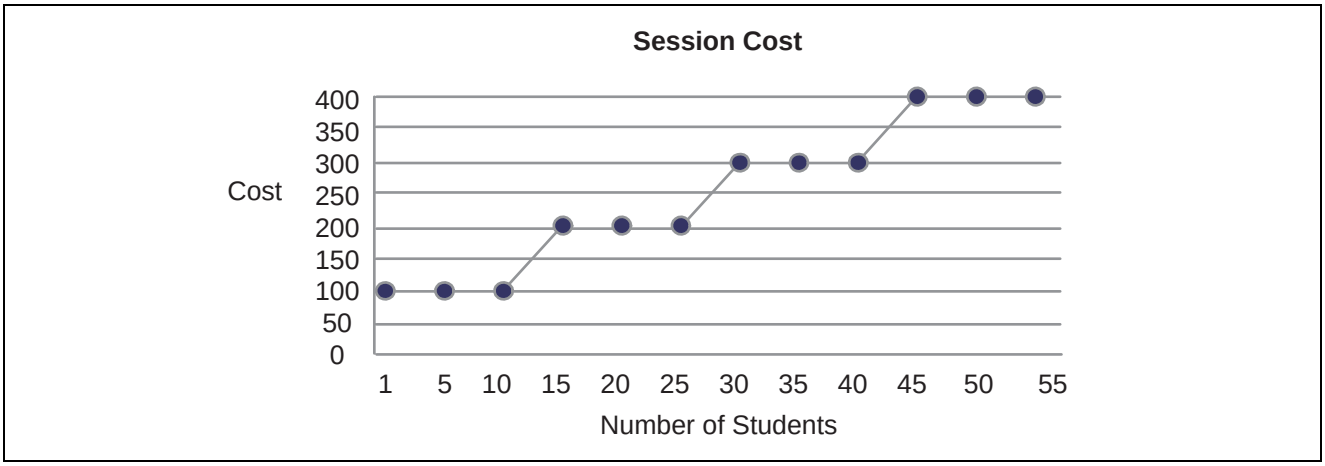
   The training cost doesn't change.

2. You add another student to the demand.

   The training cost doubles.

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

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



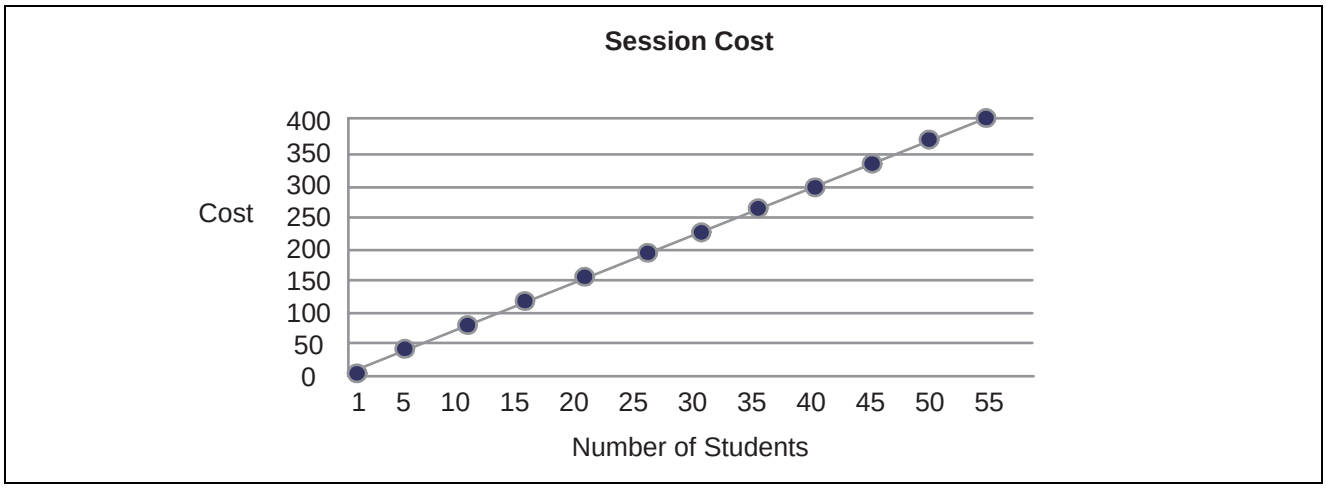
Relationship of cost to the expected number of students that need to take a course

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

Number of students planned / Maximum number of students per course

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



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

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

Cost Units in Budget Cost Calculations

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

Cost Unit	Cost Computation Detail
None	Not possible: you must always provide a cost unit with a cost amount.
Km (kilometers)	These costs are converted directly to the base currency.
Flat Cost	Converted to the base currency and then multiplied by the session padding factor.
Hour	Converted to the base currency, multiplied by the course duration, and then multiplied by the session padding factor.
Day	Converted to the base currency, multiplied by the course duration, multiplied by the day annuity factor, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Week	Converted to the base currency, multiplied by the course duration, multiplied by the week annuity factor, divided by the hourly annuity factor, and then multiplied by the session padding factor.

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Cost Unit	Cost Computation Detail
Month	Converted to the base currency, multiplied by the course duration, multiplied by the month annuity factor, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Year	Converted to the base currency, multiplied by the course duration, divided by the hourly annuity factor, and then multiplied by the session padding factor.
Pers/Hr (person per hour)	Converted to the base currency, multiplied by the number of demands, and multiplied by the course duration.
Pers/Day (person per day)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, and then divided by 8 (number of hours in a business day).
Pers/Week (person per week)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, divided by 8 (number of hours in a business day), and then divided by 5 (number of days in a standard work week).
Pers/Month (person per month)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, multiplied by the month annuity factor, and divided by the hourly annuity factor.
Pers/Year (person per year)	Converted to the base currency, multiplied by the number of demands, multiplied by the course duration, and then divided by the hourly annuity factor.
Pers/Train (person per training)	Converted to the base currency and multiplied by the number of demands.

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

See Also

Chapter 3, "Setting Up Training Costs," Selecting the Base Currency for Training Costs, page 42

Creating Department Scenarios

Using the Adjust Department Demand component, you can:

- Create budget plan scenarios for a particular period.

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

- Calculate computed costs of training and compare them to the budgeted amount for a scenario.
- Determine how many employees the department can afford to train during a specified budget period.

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

This section discusses how to:

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

See Also

Chapter 4, "Defining Training Requirements," Defining Employee Training Demands and Demand by Course, page 79

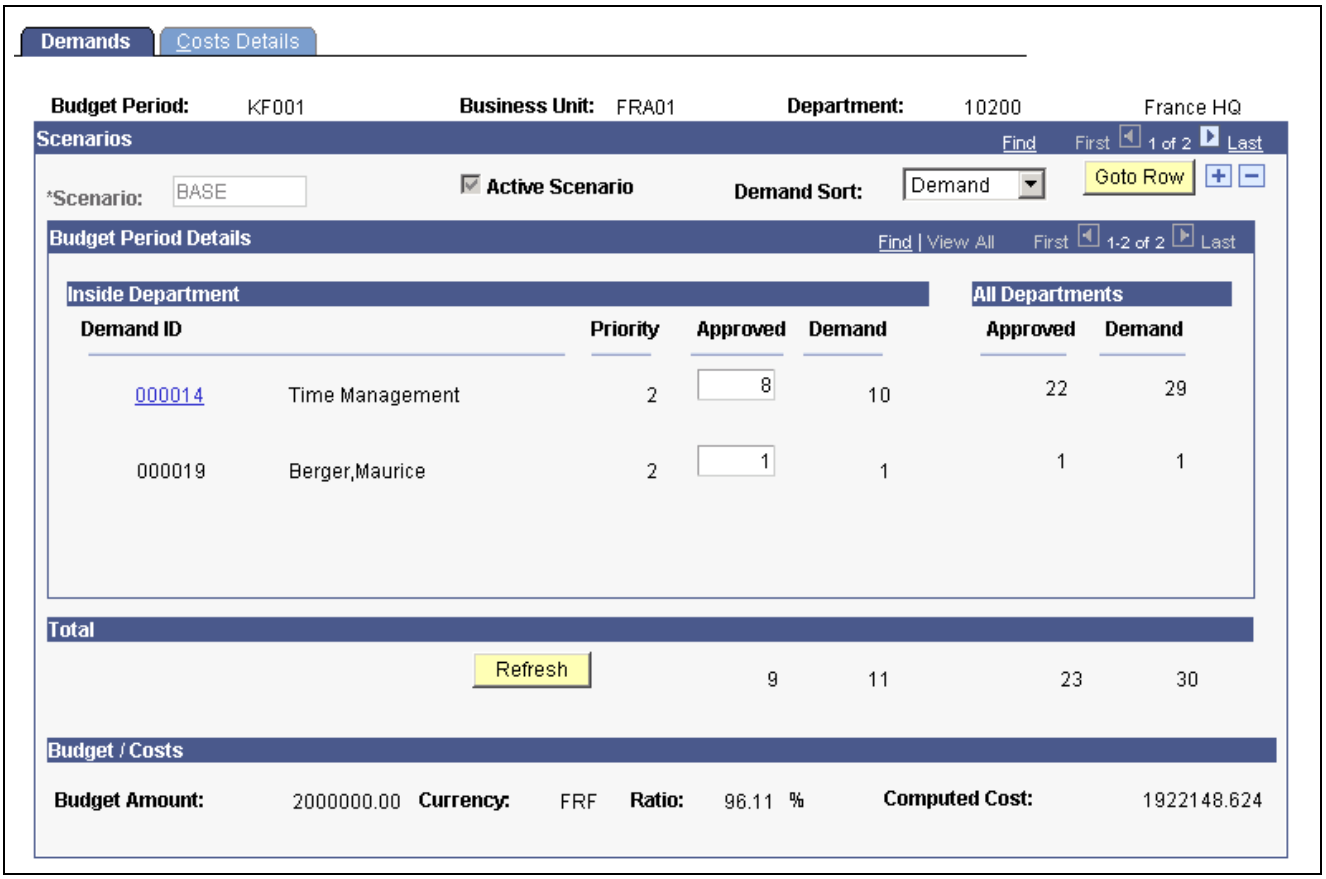
Pages Used to Create Department Scenarios

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

Developing Training Plan Scenarios

Adjust Department Demand - Demands page

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Adjust Department Demand - Demands page

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

Insert new scenarios for the department if necessary. The system makes the Scenario field unavailable if the budget period is frozen.

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

The training plan is the combination of all active scenarios from all concerned departments, so only one scenario at a time can be active for each budget period, business unit, and department, although you can have multiple scenarios in the system. Once you've created scenarios in this component, you can activate a scenario on the Choose Active Scenario page.

Demand Sort To change the order in which demands are listed, select a sort order:

Demand: Sorts by demand ID.

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

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

Inside Department

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

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

Demand ID Displays the demand ID and its description.

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

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

1: High priority.

2: Medium priority.

3: Low priority.

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

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

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

All Departments

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

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

Total

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

Refresh Click the Refresh button to adjust total or summary amounts.

Budget/Costs

This region compares the budget amount value to the computed cost value, based on the selected demands.

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

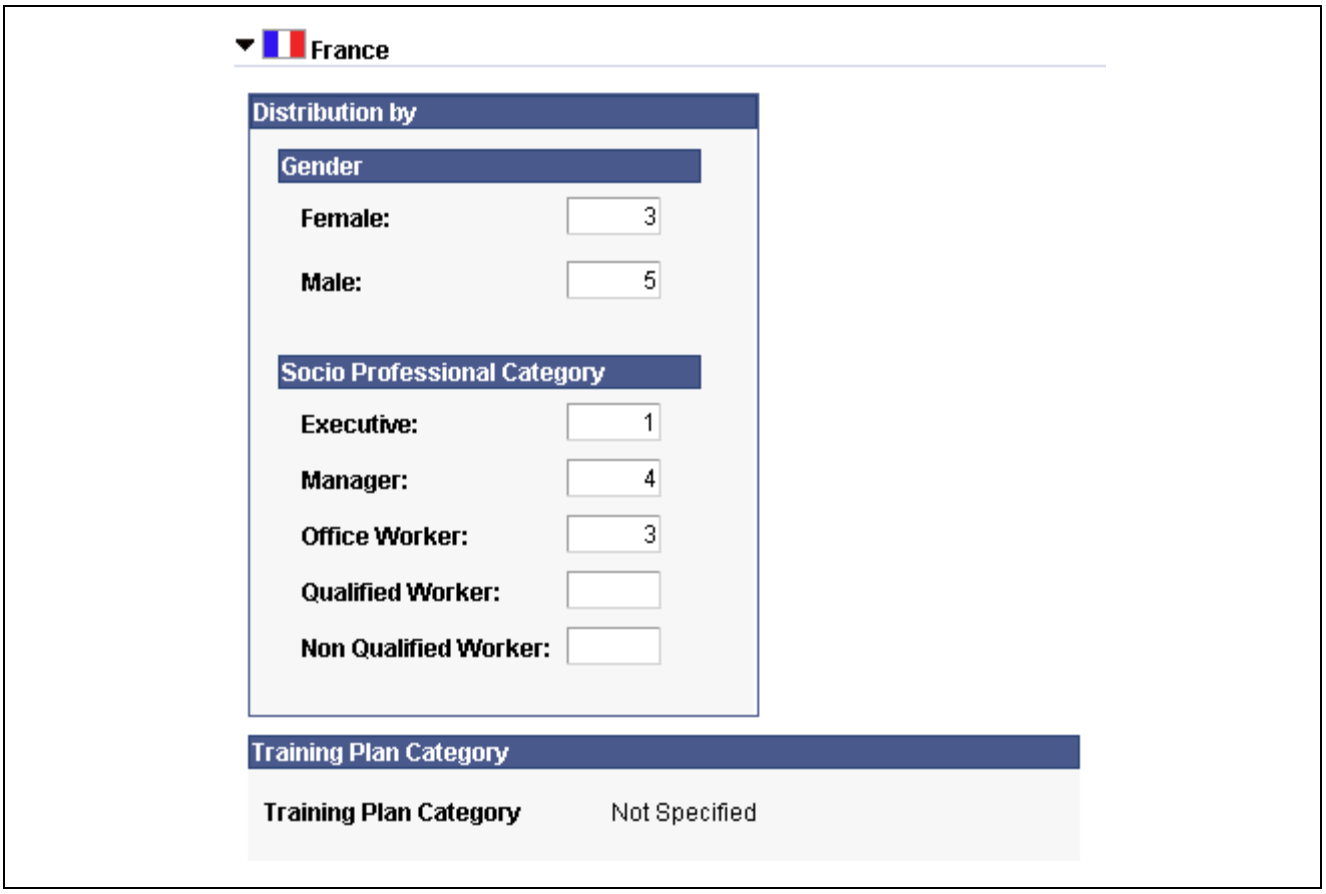
Ratio The percentage of the budget amount that the computed cost represents.

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

(FRA) Entering Country-Specific Department Information

Access the Adjust Department Demand - France page.

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Adjust Department Demand - France page

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

Gender

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

Socio Professional Category

In the field for each category, enter the number of employees who make up the demand for that category. You can print a training plan distribution report that shows how the training demands are distributed by gender and professional category.

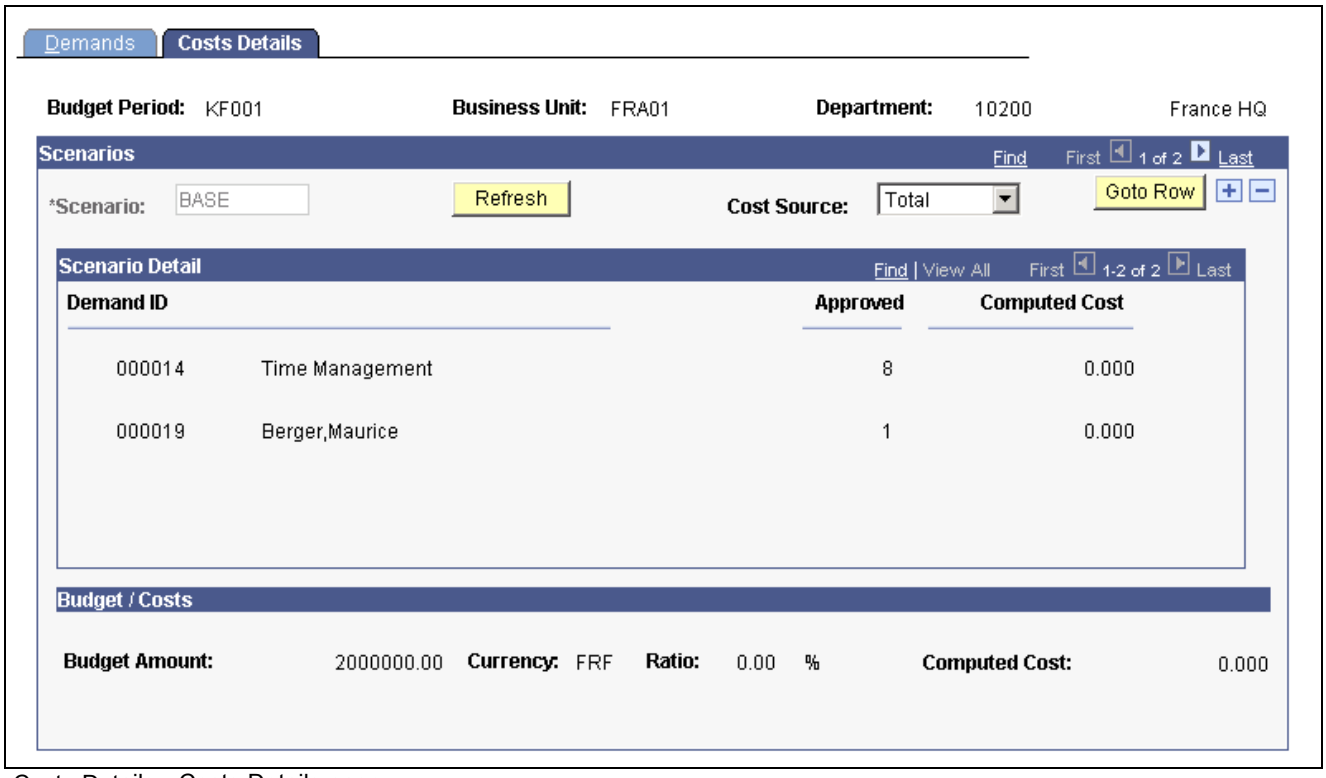
Training Plan Category

Displays the training plan category associated with the Demand ID.

Viewing Training Component Costs

Access the Costs Details - Costs Details page.

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Costs Details - Costs Details page

Scenarios

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

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

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

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

Budget/Costs

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

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

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Creating Global Scenarios

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

Options for creating global scenarios:

- Using selection criteria
- Copying existing scenarios

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

This section discusses how to:

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

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

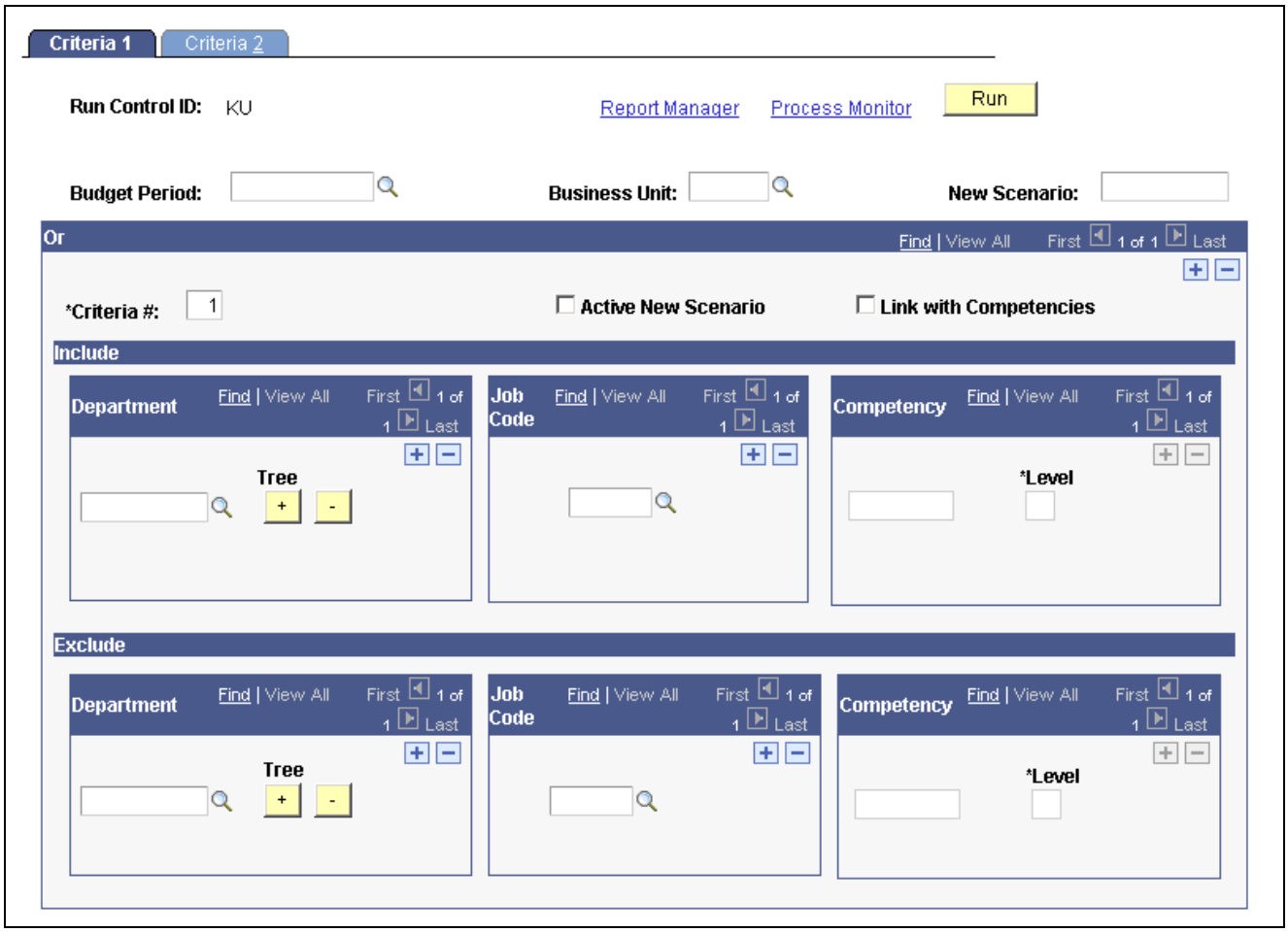
Pages Used to Create Global Scenarios

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

Including and Excluding Departments, Job Codes, and Competencies

Access the Create Scenario by Criteria - Criteria 1 page.

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Create Scenario by Criteria - Criteria 1

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

Or

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

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

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

Link with Competencies Select to include competencies as part of the criteria statement. The system makes the Competency fields available.

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

You define competency codes in the Content Catalog and the associated rating levels on the Rating Model table. When you complete the Competency fields,

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the system includes or excludes workers whose PERSON profile includes competencies at the rating that you specified. The Content Catalog, and Profile Management are part of the Manage Profiles business process.

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

Include

Department, Job Code, and **Competency**

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

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



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



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

Exclude

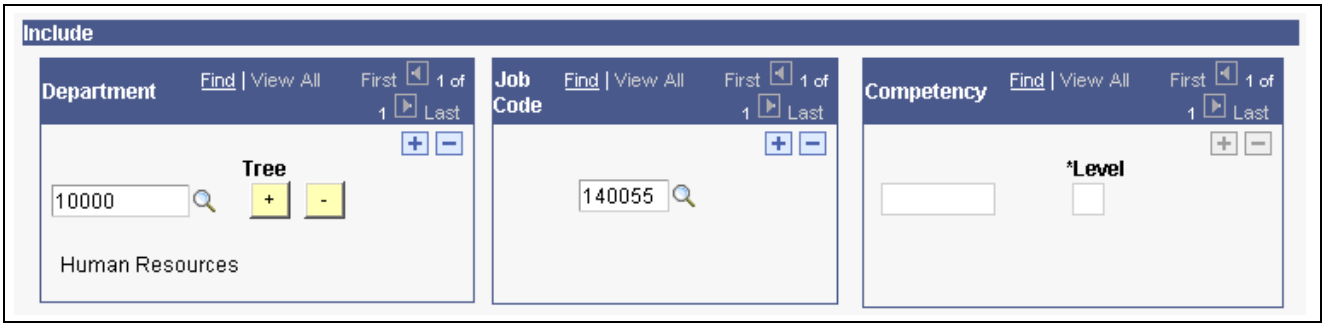
Department, Job Code, and **Competency**

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

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

Criteria Statement Example

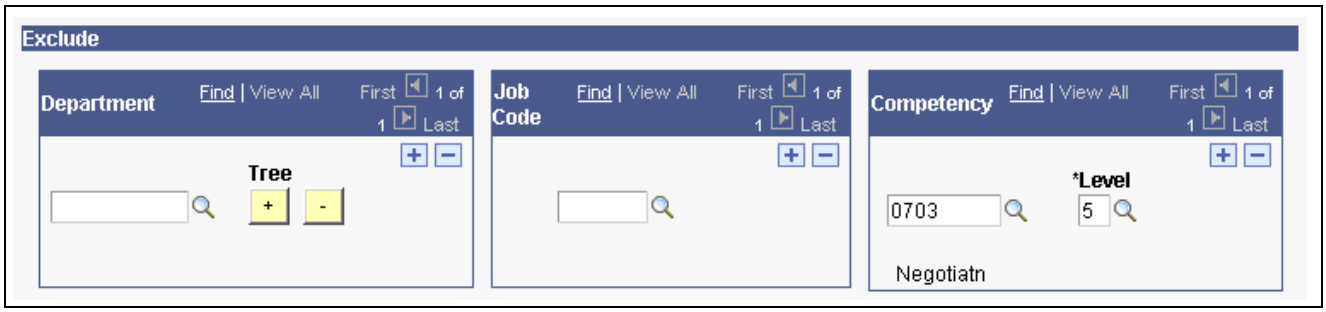
In the following example, the selection includes employees in department 10000 who are assigned to job code 140055, Payroll Analyst.



Including Criteria Statement

In the same selection criteria statement, you can exclude employees with an expert rating (level 5) in competency 0703, Negotiation, as follows:

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Excluding Criteria Statement

Note. You can decide *not* to enter a department, job code, or competency in a criteria statement. For example, if you specify department 1000 and competency 0703, but leave the job code field blank in the Exclude criteria statement, the system excludes any employee in department 10000 with an expert rating in competency 0703.

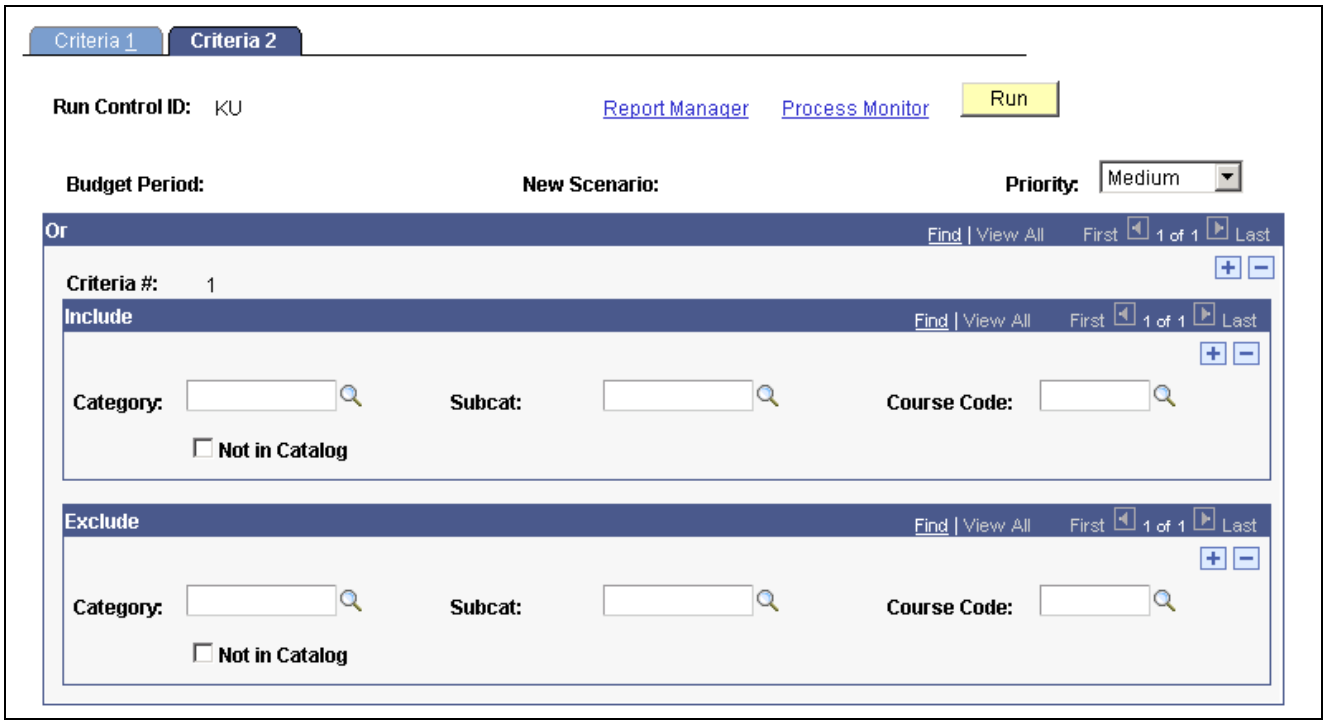
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Managing Profiles"

Writing Selection Criteria

Access the Create Scenario by Criteria - Criteria 2 page.



Create Scenario by Criteria - Criteria 2 page

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

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

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

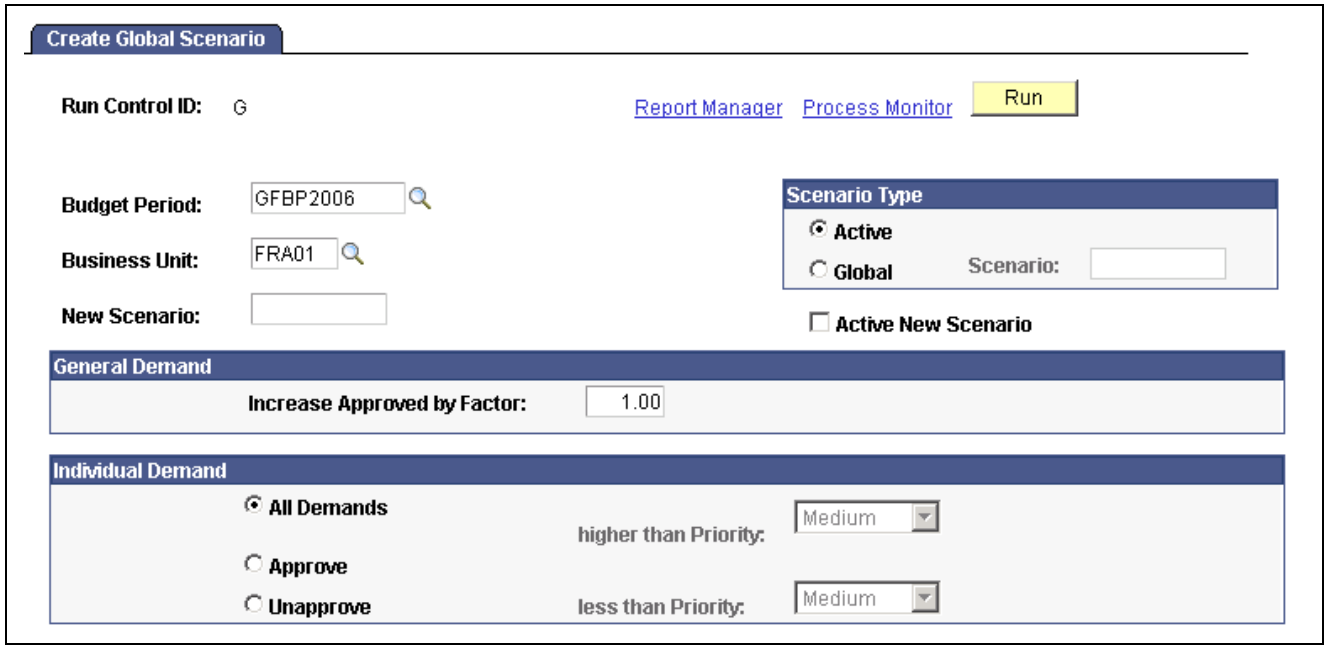
For example, if you include the category Computers, the subcategory OPER SYS (operating systems), and the course code 4002, DOS/Windows Operating System, the global scenario includes all the demands that you have for that course.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Creating Scenarios by Copying An Existing Scenario

Access the Create Global Scenario page.



Create Global Scenario page

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

Scenario Type

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

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

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

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General Demand

Increase Approved by Factor

Enter a multiplier:

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

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

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

Individual Demand

Specify employee demands to include in the new global scenario.

All Demands Select to copy existing employee demands.

Approve Select to copy approved demands to the new scenario.

higher than Priority If you approve, select a priority in this field to copy approved demands that are higher than the selected priority. Values are *Low, Medium,* and *High.*

For example, if you select *Low,* the system includes all *Medium* and *High* priority demands.

Unapprove Select to copy employee demands that are unapproved. Unapproved demands have an approved headcount of 0, even though there is a requested demand headcount for the demand ID.

less than priority If you disapprove, select a priority for copying unapproved demands that are lower than the selected priority.

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

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Activating Scenarios and Viewing Summaries

This section discusses how to:

- Activate scenarios
- View cost details

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- View demand details

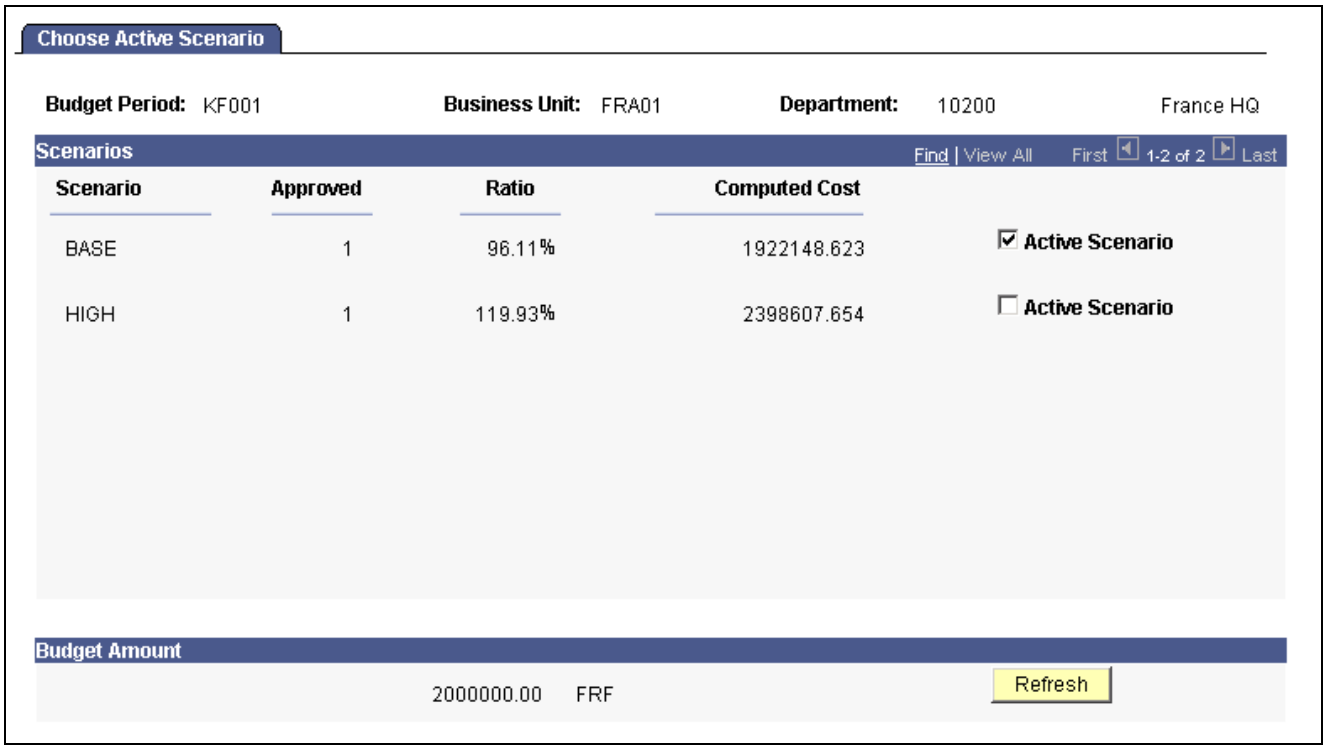
Pages Used to Activate Scenarios and View Summaries

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

Activating Scenarios

Access the Choose Active Scenario page.

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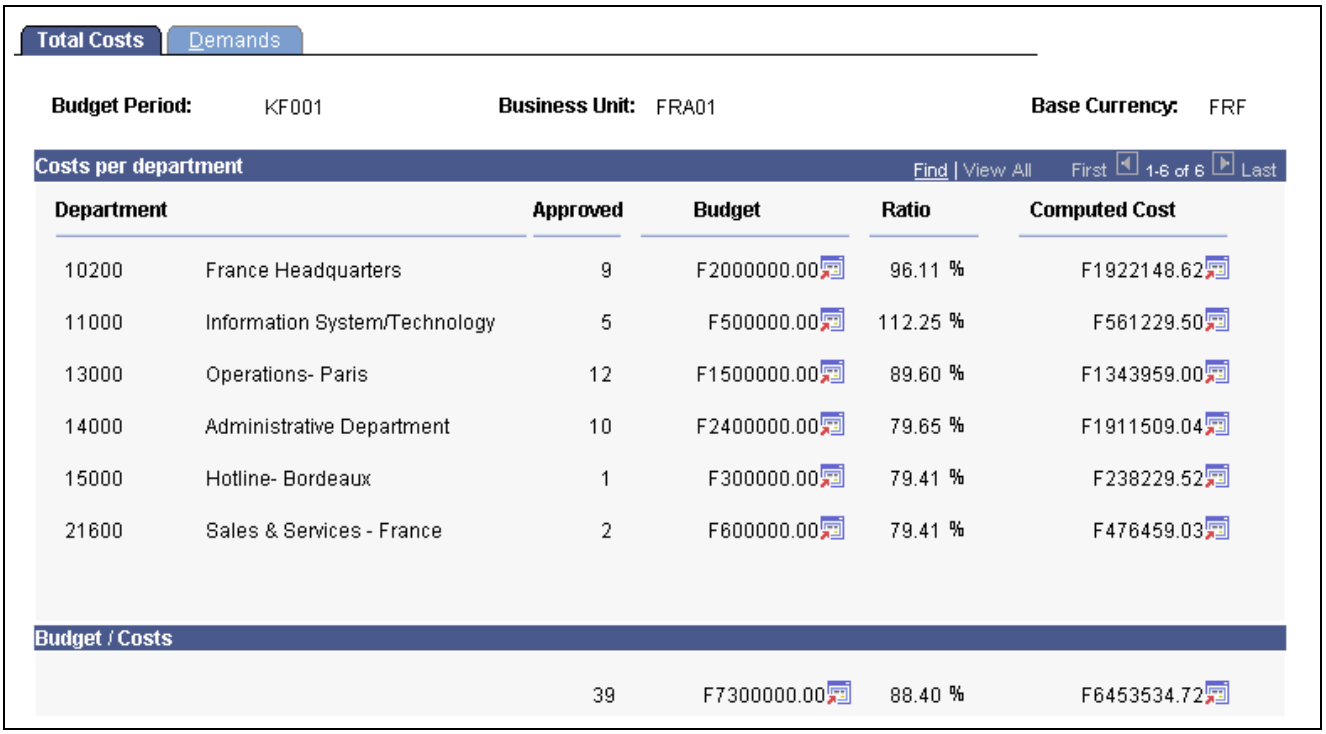
Choose Active Scenario page

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

Viewing Cost Details

Access the Summarize Active Scenario - Total Costs page.

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Summarize Active Scenario - Total Costs page

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

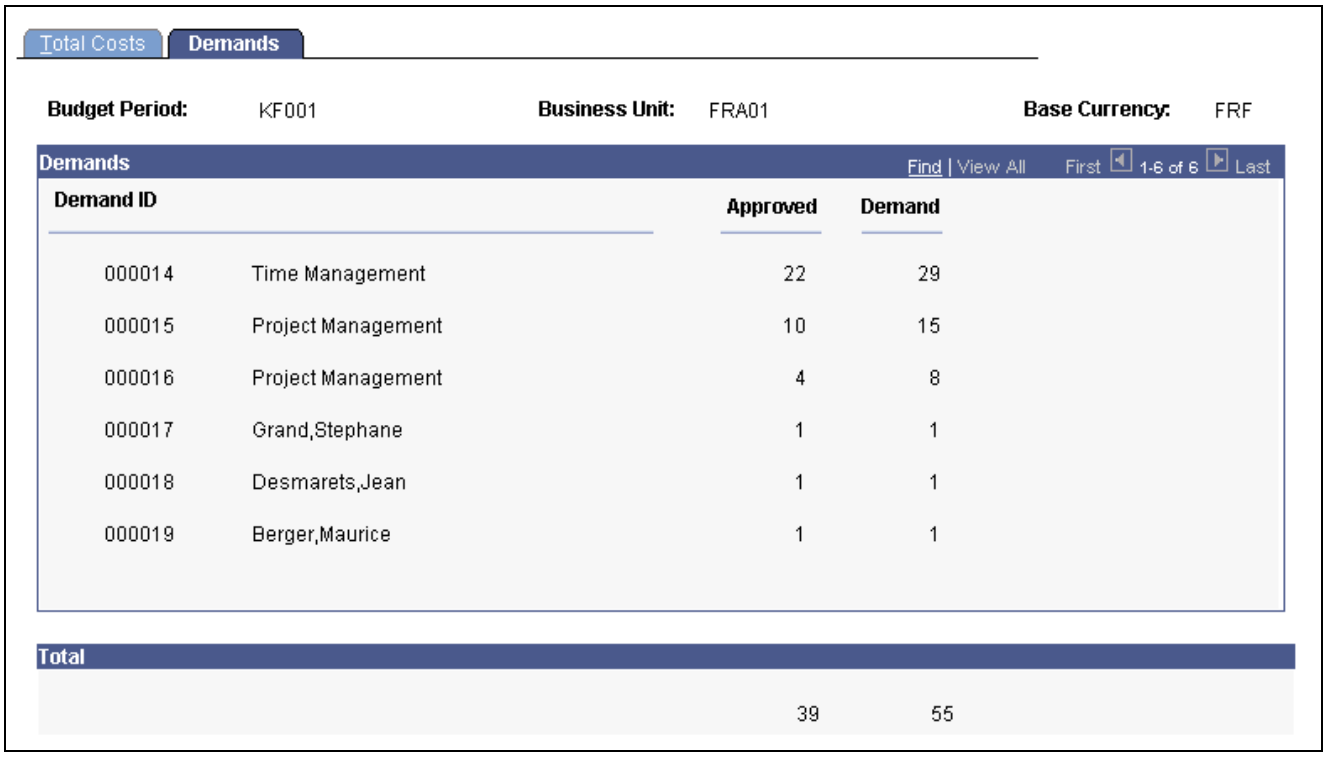
The system populates the department budget amount from the Department Budget table and the current computed cost from the Adjust Department Demand - Cost Details page. The ratio shows the percentage of the department budget amount to the current computed cost for the approved demands. You can quickly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

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

Viewing Demand Details

Access the Summarize Active Scenario - Demands page.

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Summarize Active Scenario - Demands page

Demand ID Displays the demand ID and its description.

Tracking Training Plans

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

This section discusses how to:

- Define departmental views.
- Review a course list.
- Review training plans.

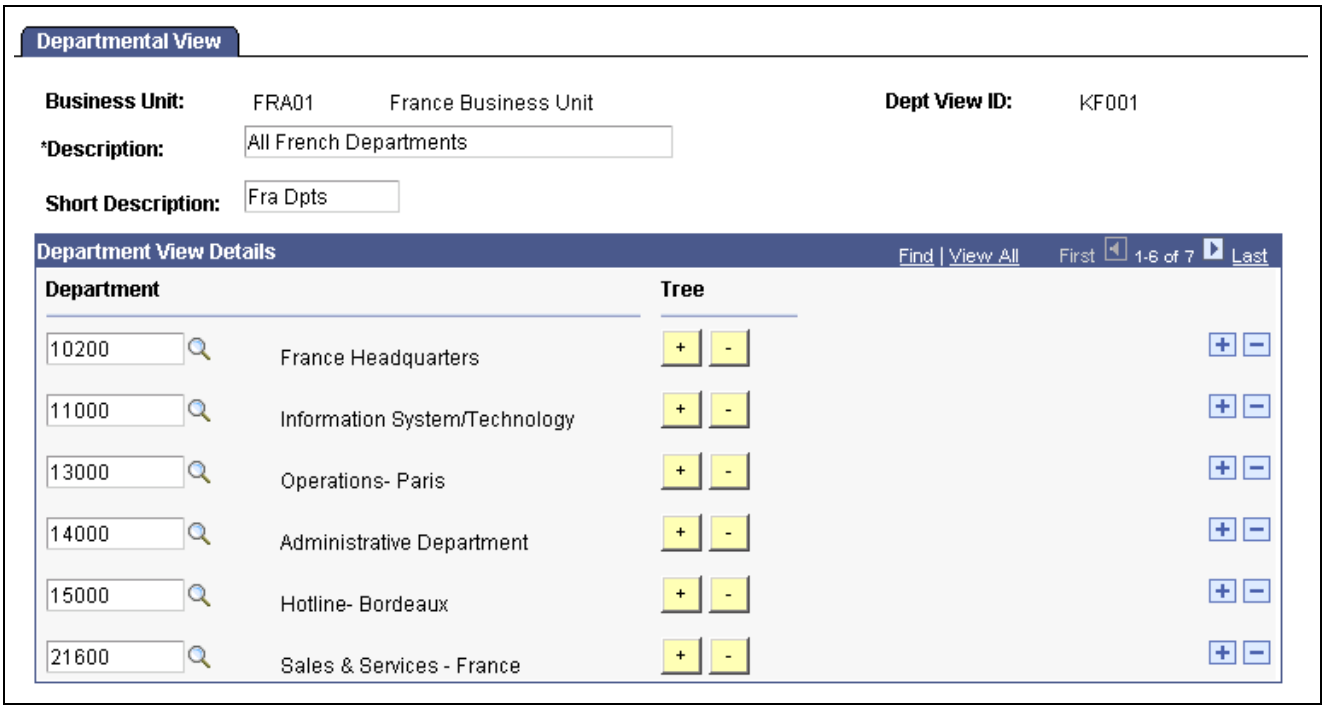
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Pages Used to Track Training Plans

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

Defining Departmental Views

Access the Departmental View page.



Departmental View page

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

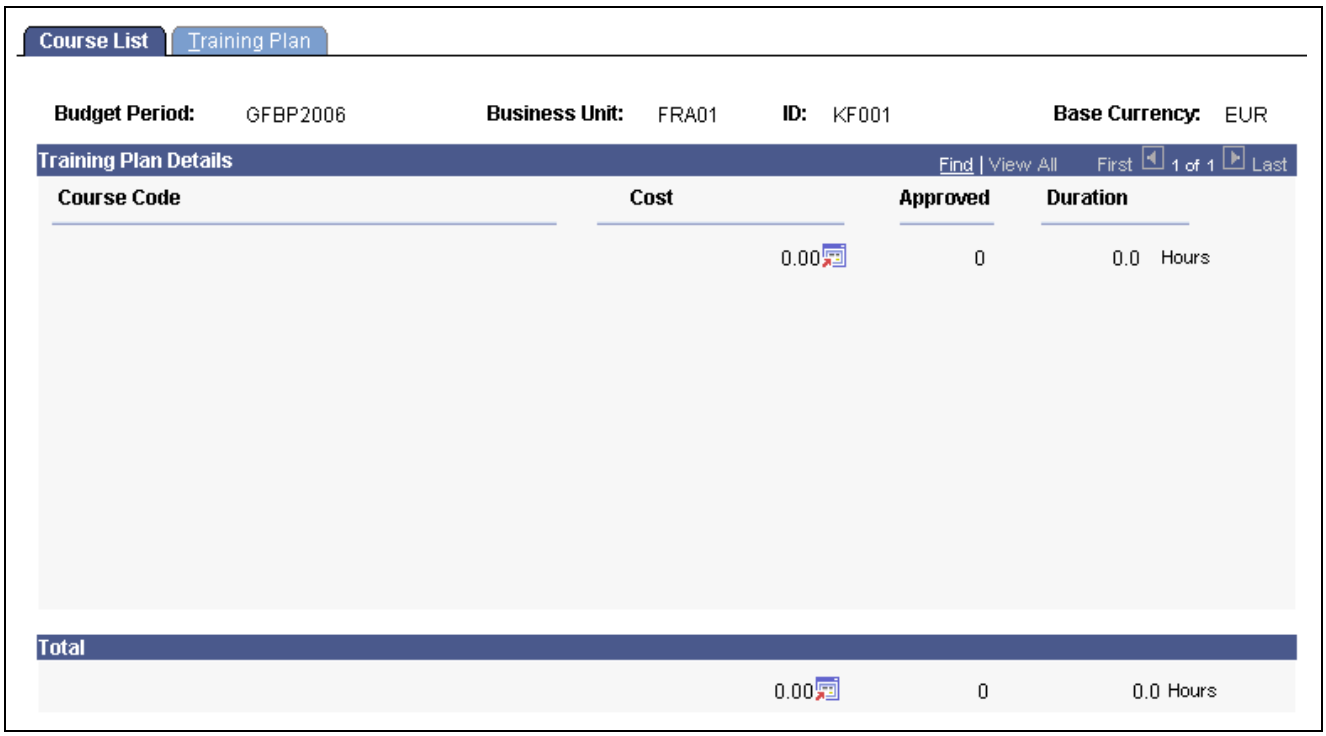
See Also

Chapter 4, “Defining Training Requirements,” Department Trees, page 63

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Reviewing the Course List

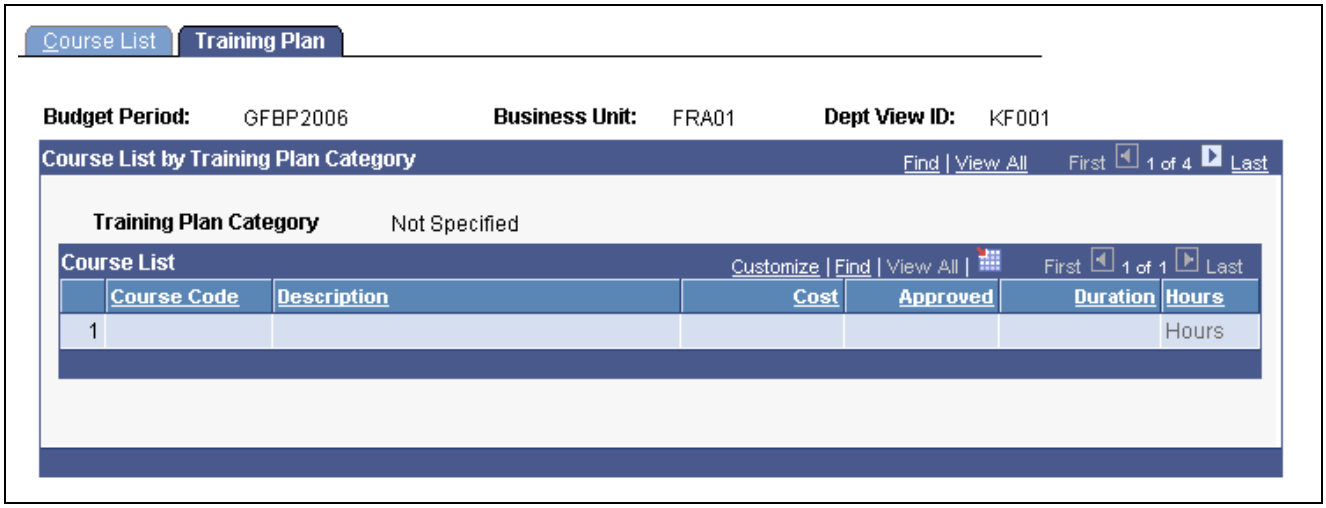
Access the Review Training Plan - Course List page.



Review Training Plan - Course List page

Reviewing Training Plans

Access the Review Training Plan - Training Plan page.



Review Training Plan - Training Plan page

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Freezing Budgets, Moving Unapproved Demands, and Deleting Scenarios

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

Once you freeze a budget:

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

  You can set the system to include employees whose training requests weren't approved in one budget period as part of the demand for the next budget period.
- You can delete scenarios that you no longer need.
- You can use this training plan to track budgeted costs verse actual costs.

This section discusses how to:

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

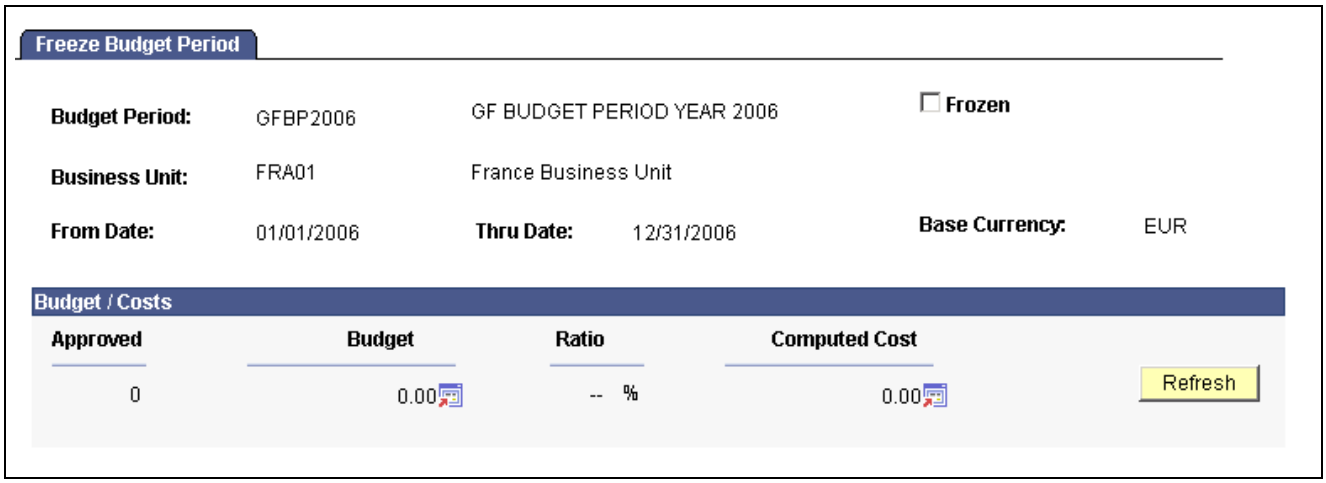
Pages Used to Freeze Budgets, Move Unapproved Demands, and Delete Scenarios

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

Freezing Budget Periods

Access the Freeze Budget Period page.

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Freeze Budget Period page

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

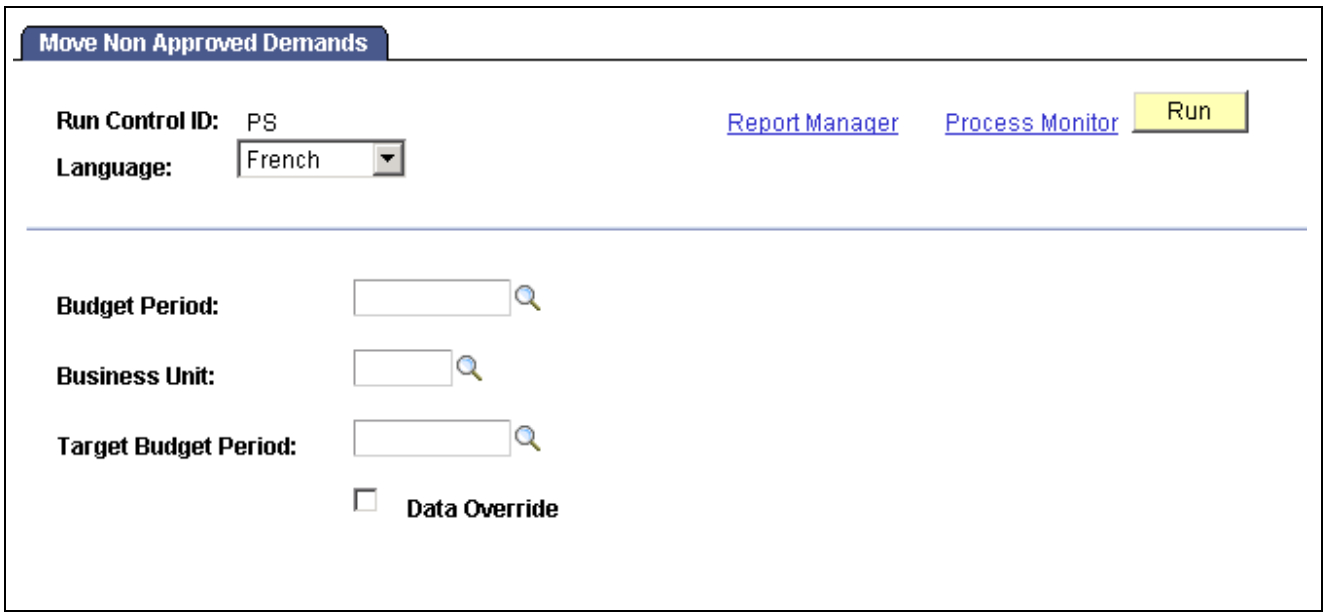
To freeze the plan, select the Frozen check box and save the page. This freezes the budget for the entire business unit.

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

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

Moving Unapproved Demands to the Next Period

Access the Move Non Approved Demands page.



Move Non Approved Demands page

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

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

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

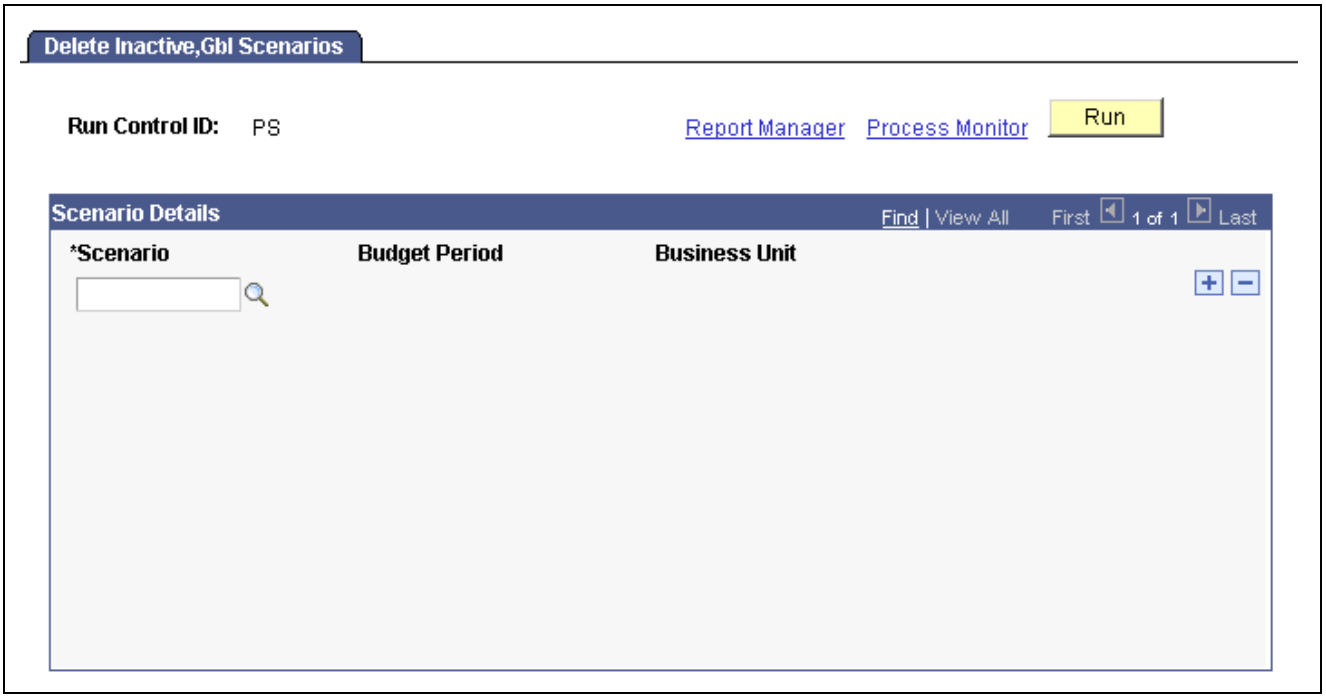
Note. Apply this process to unapproved budgets before creating new demands for the target budget period.

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

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

Deleting Obsolete Scenarios

Access the Delete Inactive,Gbl Scenarios (delete Inactive, global scenarios) page.



Delete Inactive,Gbl Scenarios (delete Inactive, global scenarios) page

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

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Scenario Details

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

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

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

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Running Budget Training Reports

This section discusses how to generate budget training reports.

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Pages Used to Run Budget Training Reports

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

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CHAPTER 6

Administering Course Sessions

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

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

Understanding Course Sessions

This section lists common elements and discusses cut sessions.

Common Elements Used in This Chapter

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

Cut Sessions

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

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

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See Also

Chapter 2, “Defining Training Courses and Programs,” page 5

Planning and Setting Up Course Sessions

This section discusses how to:

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

Pages Used to Plan and Set Up Course Sessions

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

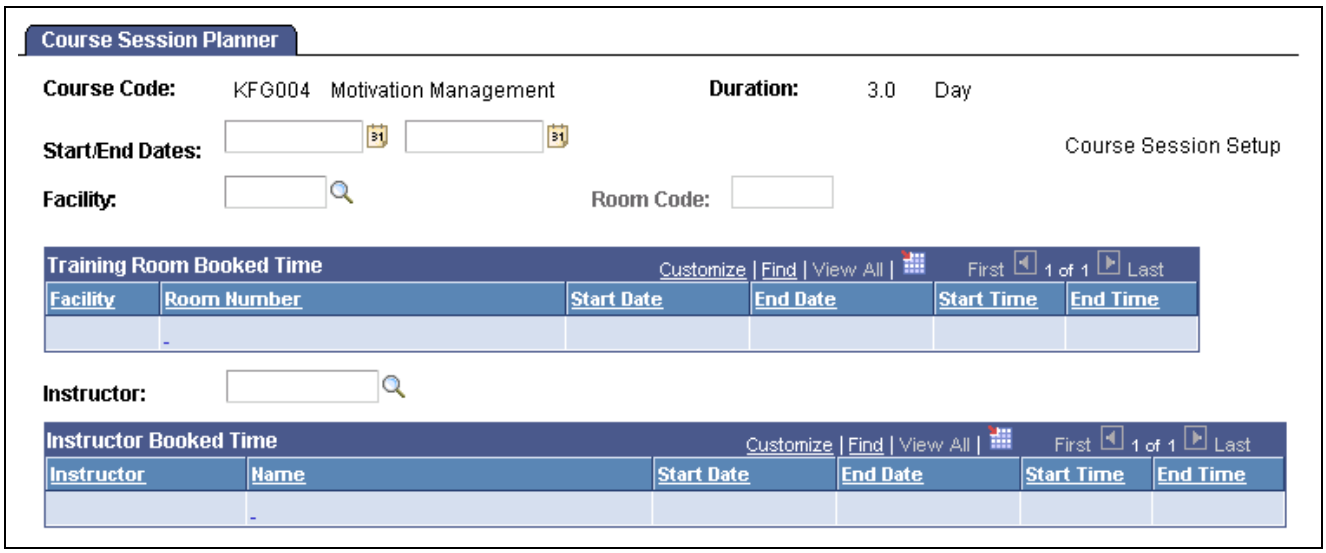
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Page Name	Object Name	Navigation	Usage
Course Sessions - Location, Instructor	COURSE_SESSN_TBL2A	Enterprise Learning, Define Course/Cost Details, Course Sessions, Location, Instructor	Set up the location of the course session and the course instructor.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

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Planning New Course Sessions

Access the Course Session Planner page.



Course Session Planner page

Start/End Dates

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

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

Start/End Times

The system displays these fields when you enter the end date. Enter the start and end times for the course session.

Course Session Setup

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

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

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

Facility

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

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Room Code The system makes this field available for entry when you complete the Facility field. Select a room code from the list. When you leave the field, the system checks existing room bookings and updates the Training Room Booked Time group box to show the bookings for the selected room. If this group box is blank, there are no bookings for that room.

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

Viewing Instructor Schedules

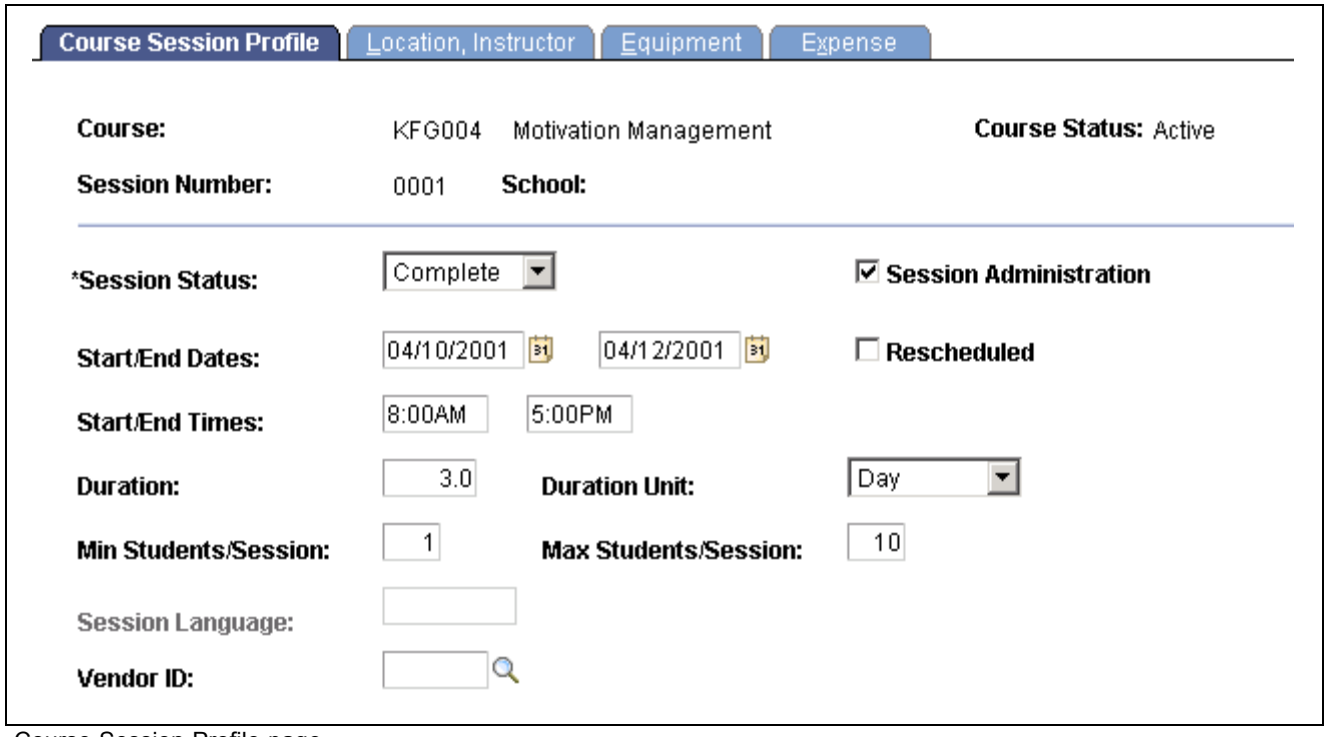
Access the Course Session Planner Instr. page.

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

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

Setting Up General Session Information

Access the Course Session Profile page.



Course Session Profile page

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

Session Number

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

You can reuse session numbers from completed or canceled sessions.

Session Status

Select a status:

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

Canceled: Select if the session has been canceled.

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

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

When you change the start or end date, the system updates the student training records for students who are on waiting lists or enrolled in course sessions.

Note. (FRA) The system uses the session start date to determine the fiscal year in which costs are charged. If the session dates cover two fiscal years (that is, the start date is before December 31 and the end date is after January 1). Then, the costs may not occur properly and chargeable costs may not be reported correctly on the 2483 report. In this case, it is better to create two separate sessions.

Rescheduled

Select if you change session information, such as dates or times, so that you know that you've made changes to the original information.

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

Session Administration

When selected, this session appears in the search results for the Enroll Individually component (COURSE_ENROLLMENT1) if it meets the search criteria. You must select this check box to enroll learners in this session by using the Enroll Individually component.

The system selects this check box by default, but you can clear it.

Duration and **Duration Unit**

Automatically populated from the Course table. You can change these values.

Min Students/Session and **Max Students/Session** (minimum students per session and maximum students per session)

Automatically populated from the Course table. If you're enrolling students in this session using the Course Auto Enrollment page, enter a number in the Max Students/Session field—otherwise the system can't enroll any students in the course. If you select a training facility code on the Course Session Table - Location, Instructor page, the system validates the number that you enter in the Max Students/Session field against the room's maximum capacity.

Session Language

This field is available if the course is designated as multilingual on the Course Table - Course Profile page.

Vendor ID

Select a vendor ID if you're outsourcing any part of a session to a vendor. Vendor IDs are stored in the Vendor table.

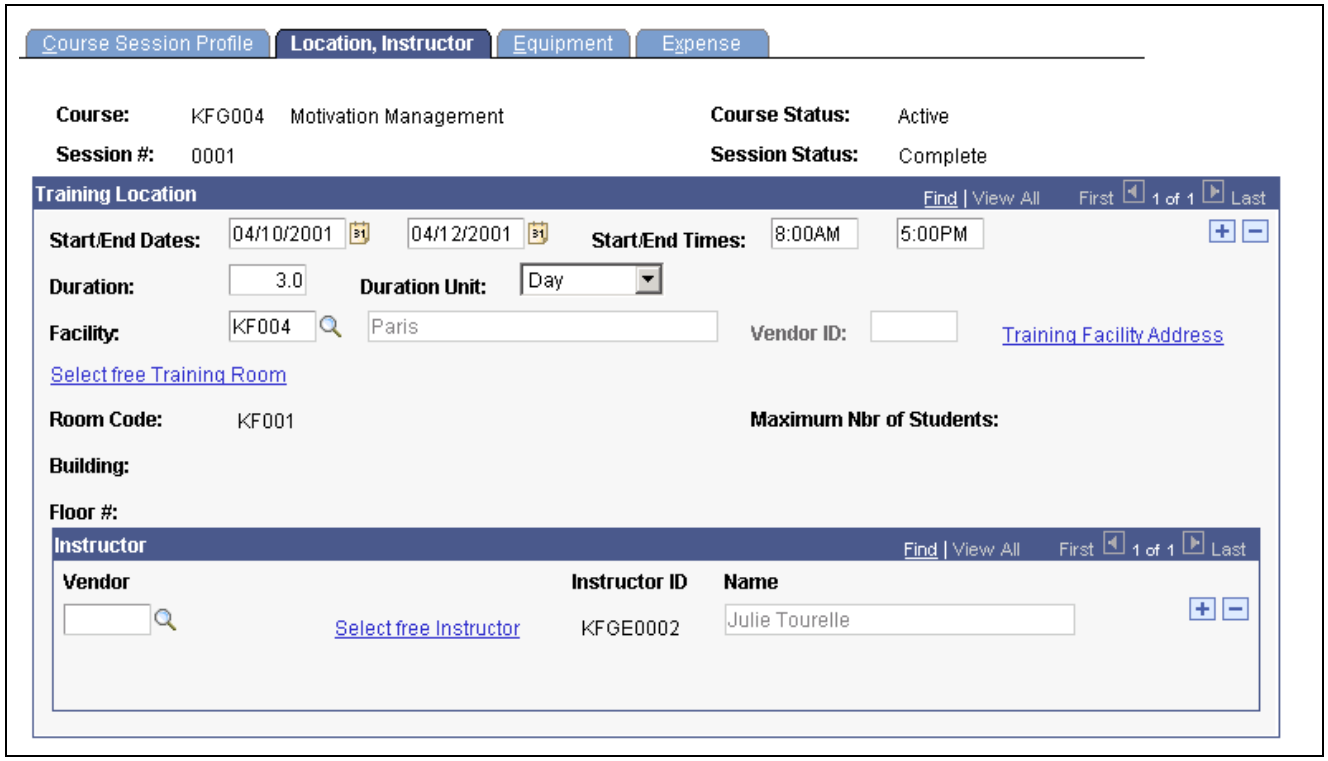
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See Also

Chapter 6, "Administering Course Sessions," Closing Completed or Canceled Sessions, page 130

Setting Up Session Locations and Instructors

Access the Course Sessions - Location, Instructor page.



Course Sessions - Location, Instructor page

Training Location

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

Start/End Dates and **Start/End Times** — Displays the course session dates and times. If the course session is divided into cut sessions, insert a row for each session, adjust the dates for each row, and adjust the times, if they vary.

Duration and **Duration Unit** — Automatically populated from the Course Session Table - Course Session Profile page. If the course session is divided into cut sessions, adjust for each cut session. Make sure that the duration of all cut sessions equals that of the course session.

Facility — If the session is at a facility that you set up in the Training Facility table, select the appropriate facility. When you leave this field, the system completes the facility name fields; you can't change them. If the training facility isn't set up in the Training Facility table, leave this field blank.

Vendor ID — If a vendor is managing the course session, select a vendor ID. When you leave this field, the system enters the vendor name.

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Select free Training Room Click this link to access the Select Free Training Room page. The system displays rooms that are available during the specified period. If the Facility field is blank, this link is unavailable.

After you select a room on the Select Free Training Room page, the room code, room name, building, floor number, and maximum number of students appear on the Course Sessions - Location, Instructor page. (The building and floor number are optional fields on the Training Facility Table - Training Rooms page and only appear if applicable.)

Training Facility Address Click to access the Training Facility Address page, which displays the address of the selected facility or vendor. If the Facility and Vendor ID fields are blank, the Training Facility Address page is blank.

Instructor

Vendor If the instructor is from a vendor, select the vendor ID. When you leave this field, the system displays the vendor name.

Select free Instructor Click this link to access the Select Free Instructor page. The system displays qualified instructors who are available during the specified period. After you select an instructor, the instructor ID and name appear on the Course Sessions - Location, Instructor page.

Viewing and Updating Session Address and Contact Details

Access the Training Facility Address page.

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

Contact Name Enter the name of a contact at the training facility.

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

Phone Enter the telephone number of the person named in Contact Name. If the person has a business phone number specified, the system completes the Phone field automatically. You can update the number.

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

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

Choosing Training Rooms

Access the Select Free Training Room page.

The system displays the rooms that meet these criteria:

- The room is available during the period that you specified on the Course Session Table - Location, Instructor page.

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- The room can accommodate the maximum number of students that you specified on the Course Session Table - Course Session Profile page.

Room Code Select a check box to book the associated training room for the course session or cut session.

Room Nbr (room number) System displayed. You set up training rooms in the Training Facility Table page.

Choosing Instructors

Access the Select Free Instructor page.

The system includes displays instructors who are:

- Qualified to teach the course.

  You use the Instructor Table - Qualification page to define the courses that an instructor can teach. If the course is multilingual, the system checks the instructor's language skills. Only instructors who can teach in the language you specified on the Course Session Table - Course Session Profile page are on the list. Record instructors' language abilities in their profile. The system checks instructor's PERSON profile type only. Profiles are defined in the Manage Profiles business process

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

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

Instructor Select a check box to book the associated instructor for the course session or cut session.

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

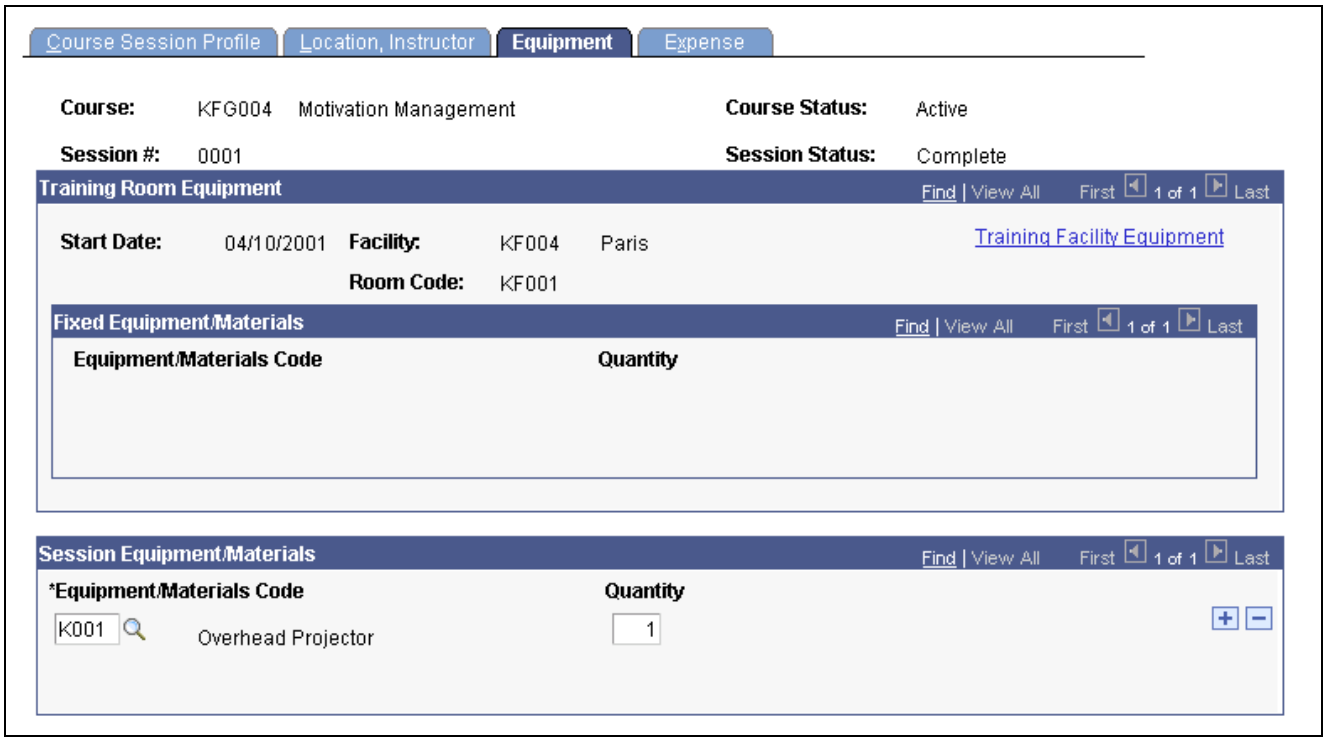
See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Managing Profiles"

Specifying Required Equipment and Materials

Access the Course Sessions - Equipment page.

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Course Sessions - Equipment page

Training Room Equipment

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

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

Fixed Equipment/Materials

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

Session Equipment/Materials

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

Equipment/Materials Code (equipment code) You set up equipment or material codes on the Equipment and Materials Table page.

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

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

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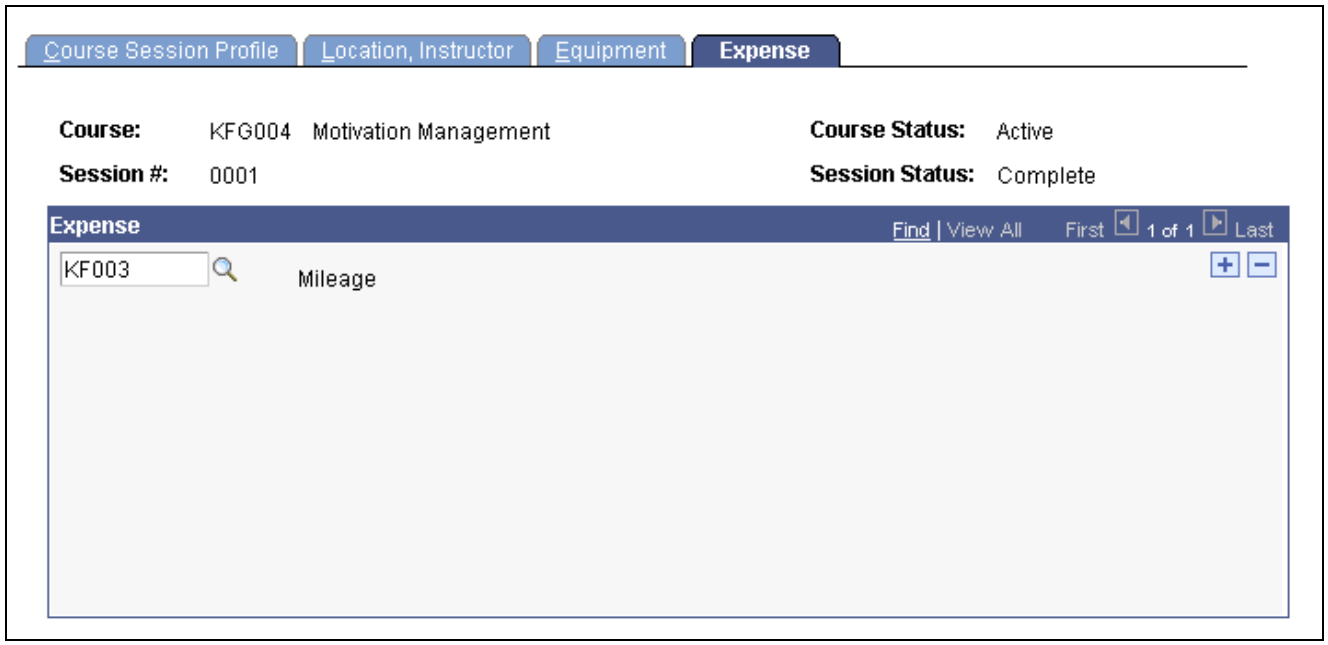
Viewing Available Equipment and Materials

Access the Training Facility Equipment page.

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

Defining Miscellaneous Session Expenses

Access the Course Sessions - Expense page.



Course Sessions - Expense page

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

Viewing Session Details

Access the Course Session Summary page.

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

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

Status Displays the session status:

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

Canceled: The session has been canceled.

Complete: The course session has completed.

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

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Setting Up Course Session Costs

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

This section discusses how to:

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

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

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

See Also

Chapter 3, "Setting Up Training Costs," Understanding Training Cost Units, page 44

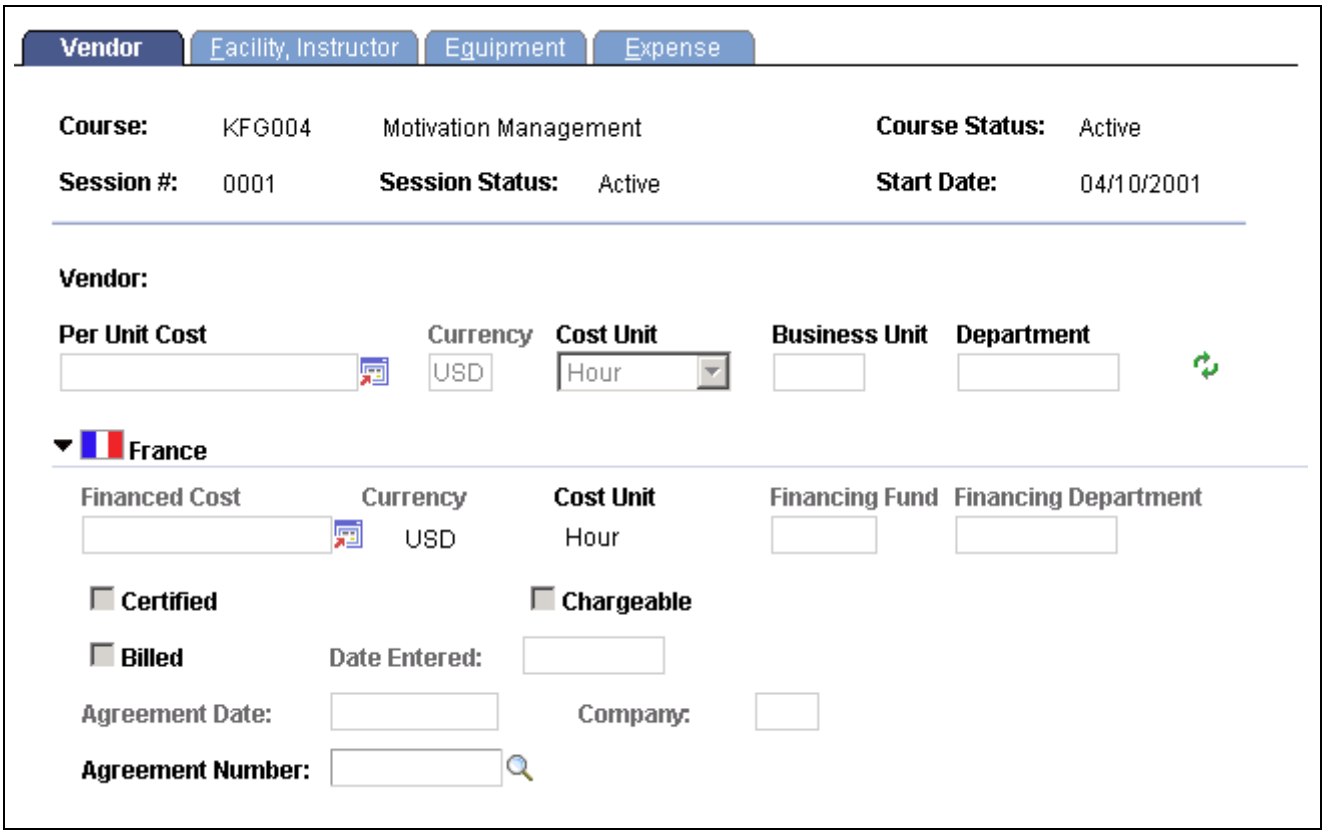
Pages Used to Set Up Course Session Costs

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

Entering Vendor Costs for a Course Session

Access the Course Session Costs - Vendor page.

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Course Session Costs - Vendor page

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

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

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

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

Hour: To track hourly charges.

Day: If the vendor bills by the day.

Refresh Click the Refresh button to display the default values from the Vendor Setup page.

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

(FRA) France

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

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Certified	Select if the vendor administering the course session is government-certified.
Chargeable	Select to make the training course a chargeable item for the 2483 report. When selected, related costs that you entered are reported in the 2483 report. This is used to meet French legal reporting requirements. The default value derives from the chargeable flag set in the Course Profile page and by the Compute Student Cost process.
Billed	Select to include the vendor cost in the 2483 report. Clear the check box to track the cost but not have it included in the 2483 report.
Date Entered	Enter the date that the agreement between the vendor and the government body was recorded in the system.
Agreement Date	Enter the start date for the agreement between the vendor and the government body.
Company	Select the government body that the vendor has an agreement with.
Agreement Number	The Agreement number is the number assigned between the two parties.

See Also

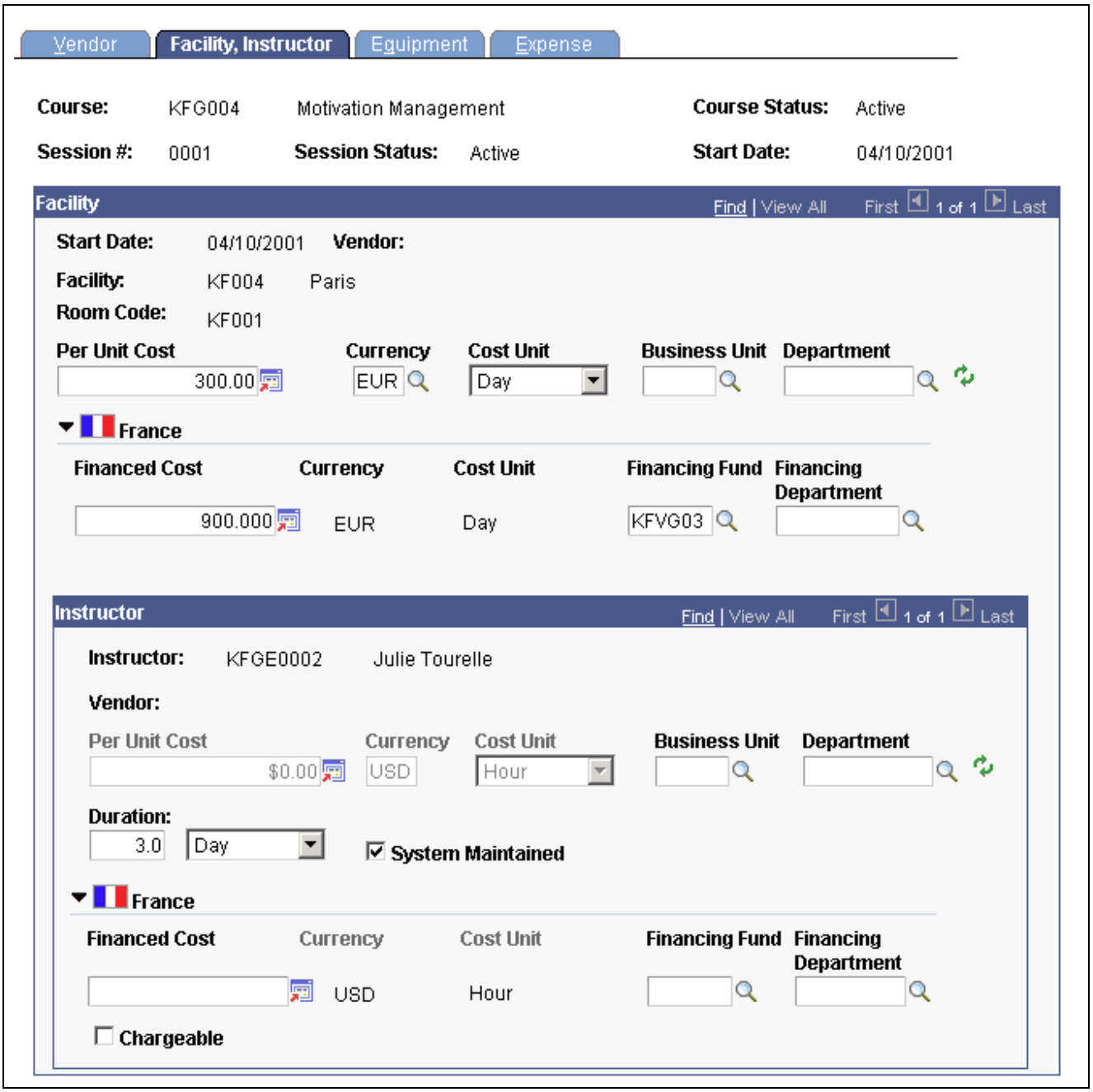
Chapter 9, "Tracking Training Costs," Calculating and Maintaining Student Costs, page 181

Chapter 12, "(FRA) Producing the French Training Report 2483," page 221

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

Access the Course Session Costs - Facility, Instructor page.

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Course Session Costs - Facility, Instructor page

Facility

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

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

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

Specify the default currency for business units for a budget period on the Budget Period table. Budgets are automatically converted to the default

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base currency that you establish on the Training Base Currency table (TRN_BASE_CURRENCY).

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

Refresh button: Click the Refresh button to display the default values from the Facility Setup table.

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

Instructor

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

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

Instructor Displays information from the Course Session table.

If the instructor is internal, the cost is defaulted from the costs defined on the Trainees Salary Costs page.

If the instructor is external, the cost is defaulted from the Instructor Setup table located on the Setup HRMS, Product Related, Enterprise Learning, Instructors page.

Note. Paid Hours is the cost unit for an internal instructor. This cost unit is useful when computing chargeable costs. You can compute the chargeable cost this way: Per Unit Costs = Employee Salary * Session Duration / Paid Hours. The system derives the Paid Hours value from the Trainees Salary Costs page.

When the instructor is full-time, defined on the Instructor Setup page, then the system informs the user that the full—time instructor should not be reported at the session level but at the company level (on the Trn 2483 Parameters Setup page).

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

Per Unit Cost Enter the cost for the instructor associated with this session. In the next field, the default currency appears. You can select a different currency.

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

Refresh button Click the Refresh button to display the default values from the Course Session Costs—Facility, Instructor page.

Duration This value is populated from the Course Session table. Update this field if the instructor costs don't match the session duration. For example, if the session duration is 2.5 days but the instructor charges for 3 days, update this field to *3* days. Updating this field doesn't change the data in the Course Session table.

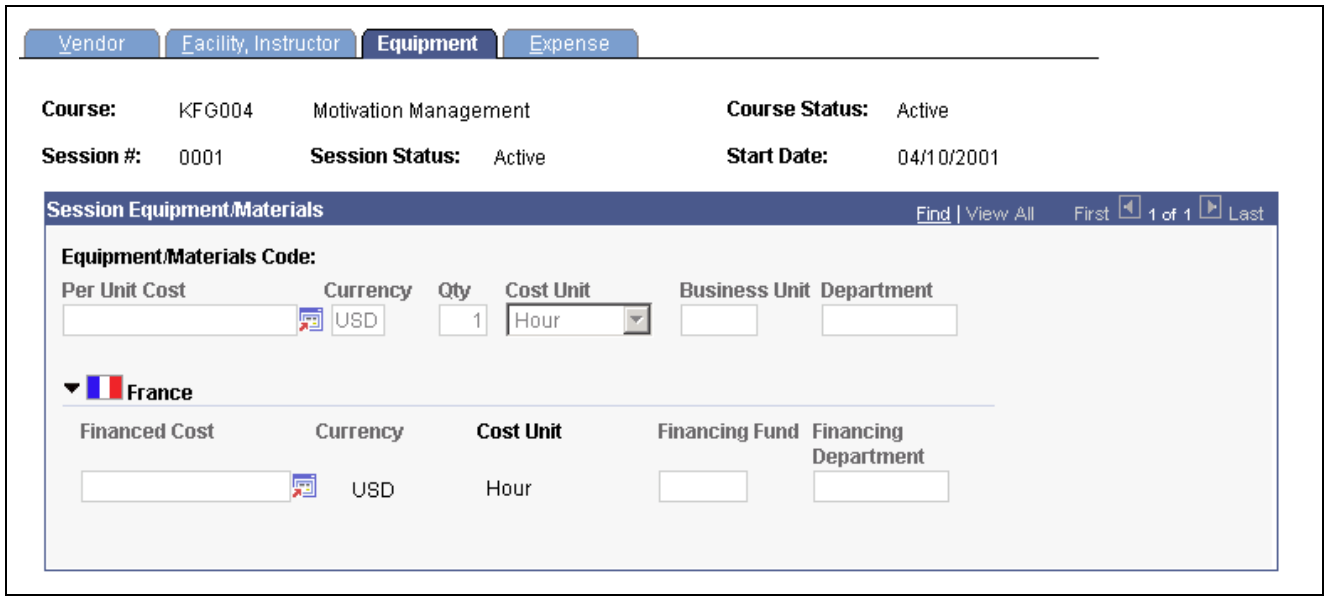
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System Maintained When this option is selected it pertains only to internal instructors and the Per Unit Cost field is deactivated. In this case, the Compute Student Costs process gets salary costs defined on the Trainees Salary Cost page. When System Maintained is deactivated, you can specify the cost on this page and the Compute Student Costs process use this page to compute the instructor chargeable cost.

(FRA) Chargeable Select to make the training course a system chargeable item for the 2483 report. When selected, related costs are entered into the 2483 report. This is used to meet French legal reporting requirements. The default value of the chargeable flag set in the Course Setup page and by the Compute Student Costs process.

Recording Costs That Are Associated with Required Equipment

Access the Course Session Costs - Equipment page.



Course Session Costs - Equipment page

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

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

Per Unit Cost Enter an amount for the item specified by the equipment code. Select a cost currency to change the default for this cost.

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

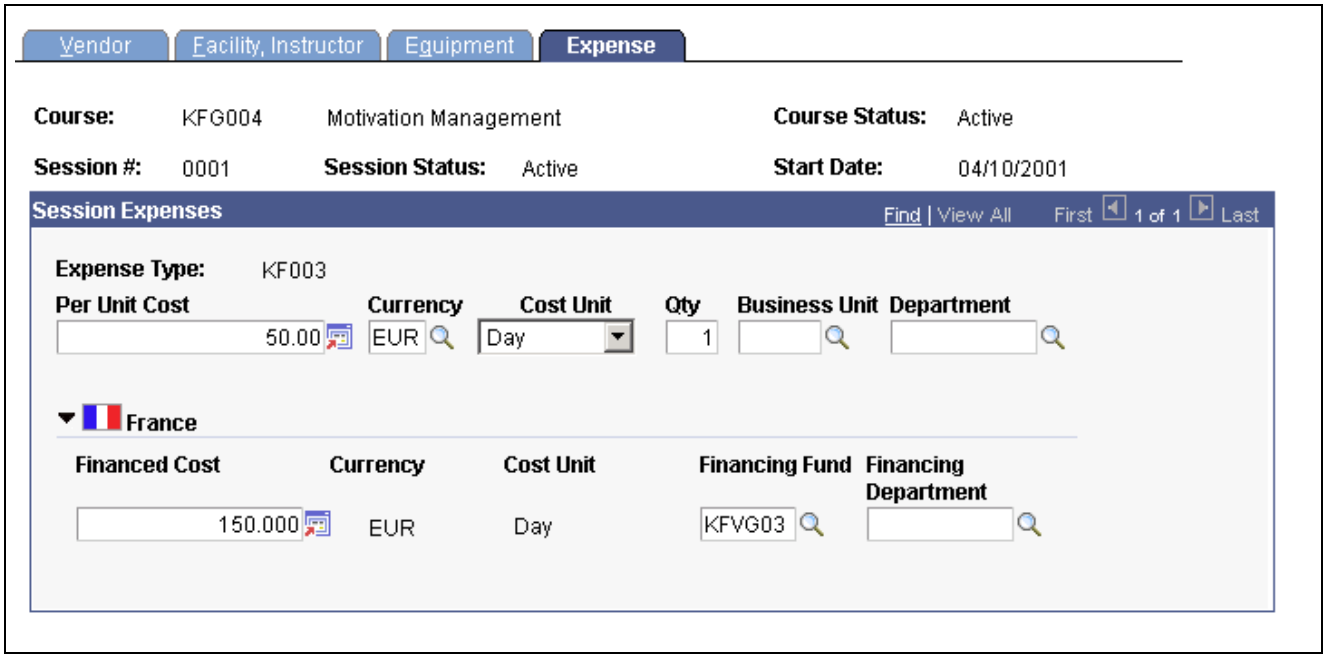
Qty (quantity) Initially populated by the Course Session table. If you enter a new quantity and save the changes, the system updates the data in the Course Session table.

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

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Recording Costs That Are Associated with Course Session Expenses

Access the Course Session Costs - Expense page.



Course Session Costs - Expense page

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

Per Unit Cost Enter a per unit cost for each expense type that is associated with this course session. The default currency is displayed; you can select a different currency.

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

Cost Unit Select the unit in which the per unit cost amount is measured. For example, if you're tracking hourly charges for parking, select *Hour;* if you reimburse a flat rate for parking, choose *Flat Cost.*

Business Unit If you're entering information for more than one expense, you can specify that each one be billed to a different business unit and department.

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

Closing Completed or Canceled Sessions

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

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To close or cancel a course session:

1. Select the course session from the Course Session table.

   Access the Course Session Table - Course Session Profile page and select the session from the list of active sessions.

2. Change the session status to *Complete,* if the session has finished, or *Canceled,* to cancel it.

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

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

  - Student profiles.

    The system assigns the competencies and accomplishments that are defined on the Course Table - Prereqs, Goals page to the students who completed the course. The system updates students' profile of type PERSON. If the student doesn't have a profile of type PERSON, the system automatically creates a profile and assigns the course competencies and accomplishments.
- If you set the session status to *Cancel* the system updates the student automatically and inserts the letter code of CAN (cancellation) so that you can generate letters notifying students of the session cancellation. You can create letter codes on the Standard Letter Table page.

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

If any students are on a waiting list for a canceled or completed session, put the students back on the waiting list so that you can enroll them in other sessions.

If you have students with a status of Session Waitlist, use the Course Wait List page to add them to the waiting list.

See Also

Chapter 7, "Enrolling and Wait-Listing Students," Generating Student Form Letters, page 140

Chapter 6, "Administering Course Sessions," Planning and Setting Up Course Sessions, page 114

Recording Student Feedback

This section discusses how to:

- Record general student feedback on course sessions.
- (USF) Enter individual training evaluations.
- Record specific student feedback.

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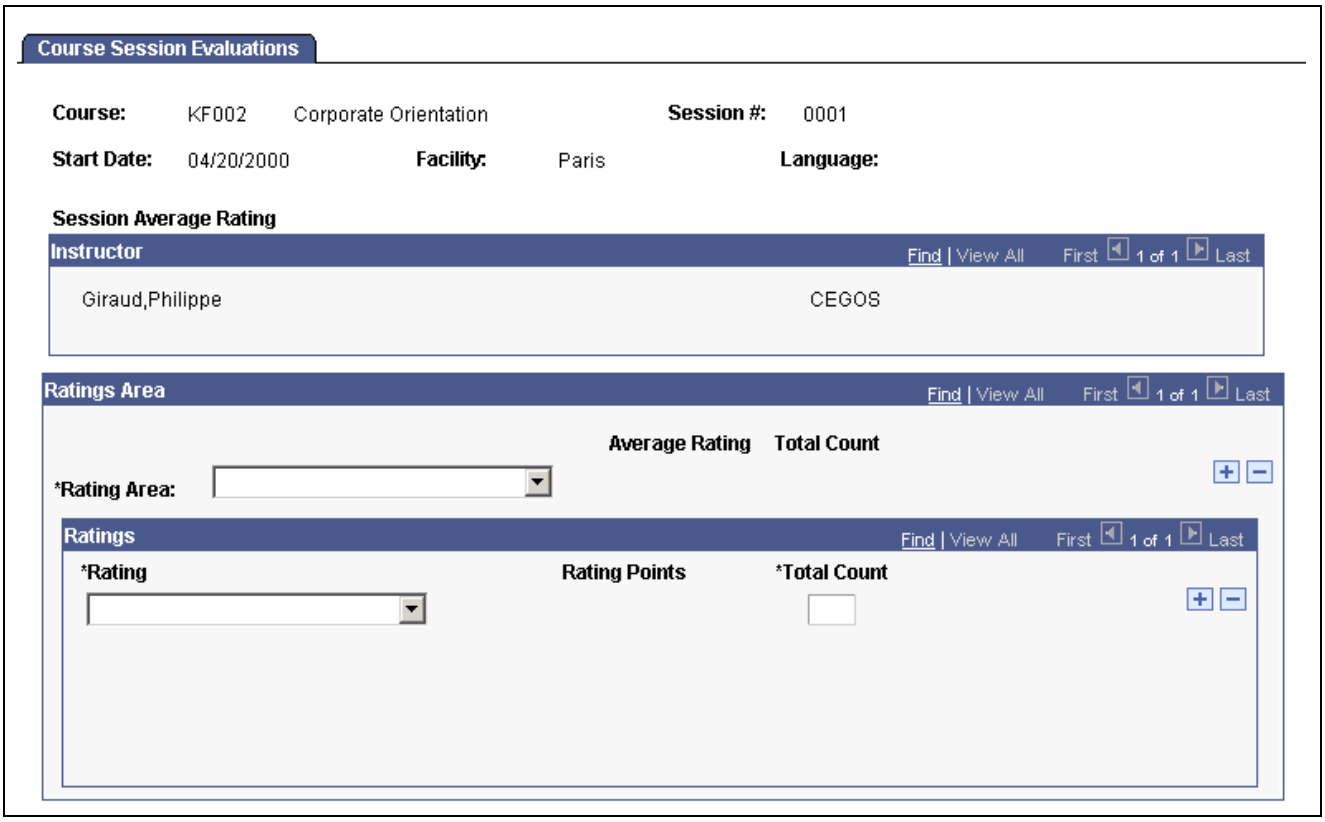
Pages Used to Record Student Feedback

Page Name	Object Name	Navigation	Usage
Course Session Evaluations	COURSE_EVALUATNS	Enterprise Learning, Result Tracking, Evaluate Course Session, Course Session Evaluations	Record student feedback on course sessions so that you know what areas need improvement.
Individual Training Evaluation - Course Information	GVT_TRNREQ_SEC_CE1	Enterprise Learning, Result Tracking, Individual Training Evaluation, Course Information	Enter general information about the course, including the start and end date of the course session and the course hours. Indicate each employee's completion status, grade, and overall rating of the course.
Individual Training Evaluation - Evaluation Data	GVT_TRNREQ_SEC_CE2	Enterprise Learning, Result Tracking, Individual Training Evaluation, Evaluation Data	Record an employee's feedback about various areas of the course such as course materials, applicability of the course, and training facilities.
Individual Training Evaluation - Comments	GVT_TRNREQ_SEC_CE3	Enterprise Learning, Result Tracking, Individual Training Evaluation, Comments	Enter employee comments about strong or weak aspects of the training. Enter employee recommendations.

Recording General Student Feedback on Course Sessions

Access the Course Session Evaluations page.

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Course Session Evaluations page

If you entered a facility and instructor in the Course Session table, the system displays the information here.

Ratings Area

Rating Area Select from *Content, Facility, Instructors, Materials,* or *Presentation.*

Average Rating Displays the average rating for the area.

Total Count Displays the number of evaluations received for the rating area. This is the sum of the Total Count fields in the Ratings scroll area.

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

Ratings

Use this scroll area to enter student evaluations of the specified rating area. Add a row for each rating level. For example, if four students evaluate the Content area of the course session, with three students giving a rating of *Excellent* and one student giving a rating of *Good,* you add one row to record the number of *Excellent* ratings and one row for the *Good* ratings.

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

1: Excellent

2: Good

3: Fair

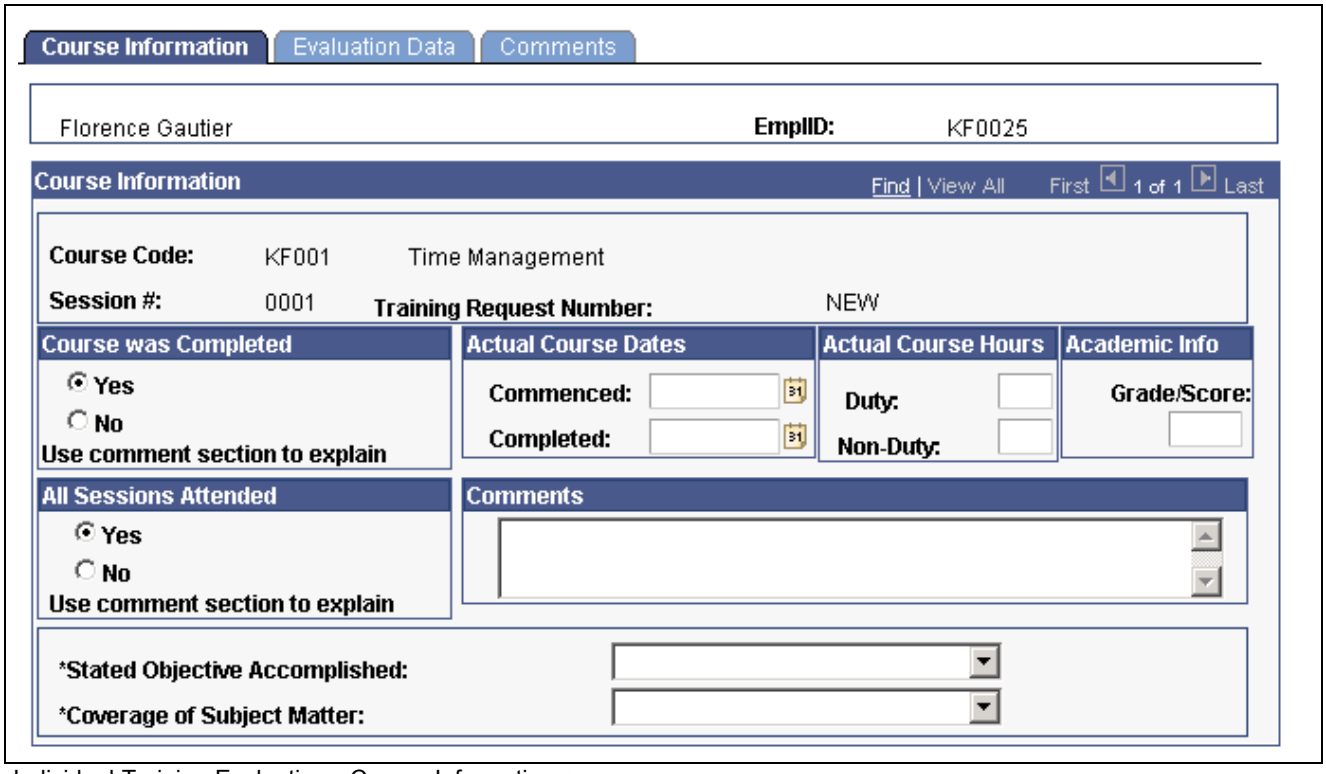
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4: Poor

Total Count Enter the number of students who gave each rating.

(USF) Entering Individual Training Evaluations

Access the Individual Training Evaluation - Course Information page.



Individual Training Evaluation - Course Information page

Federal users can enter detailed training evaluations for individual employees.

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

Comments Enter an optional explanation of the responses to the preceding fields.

Actual Course Hours

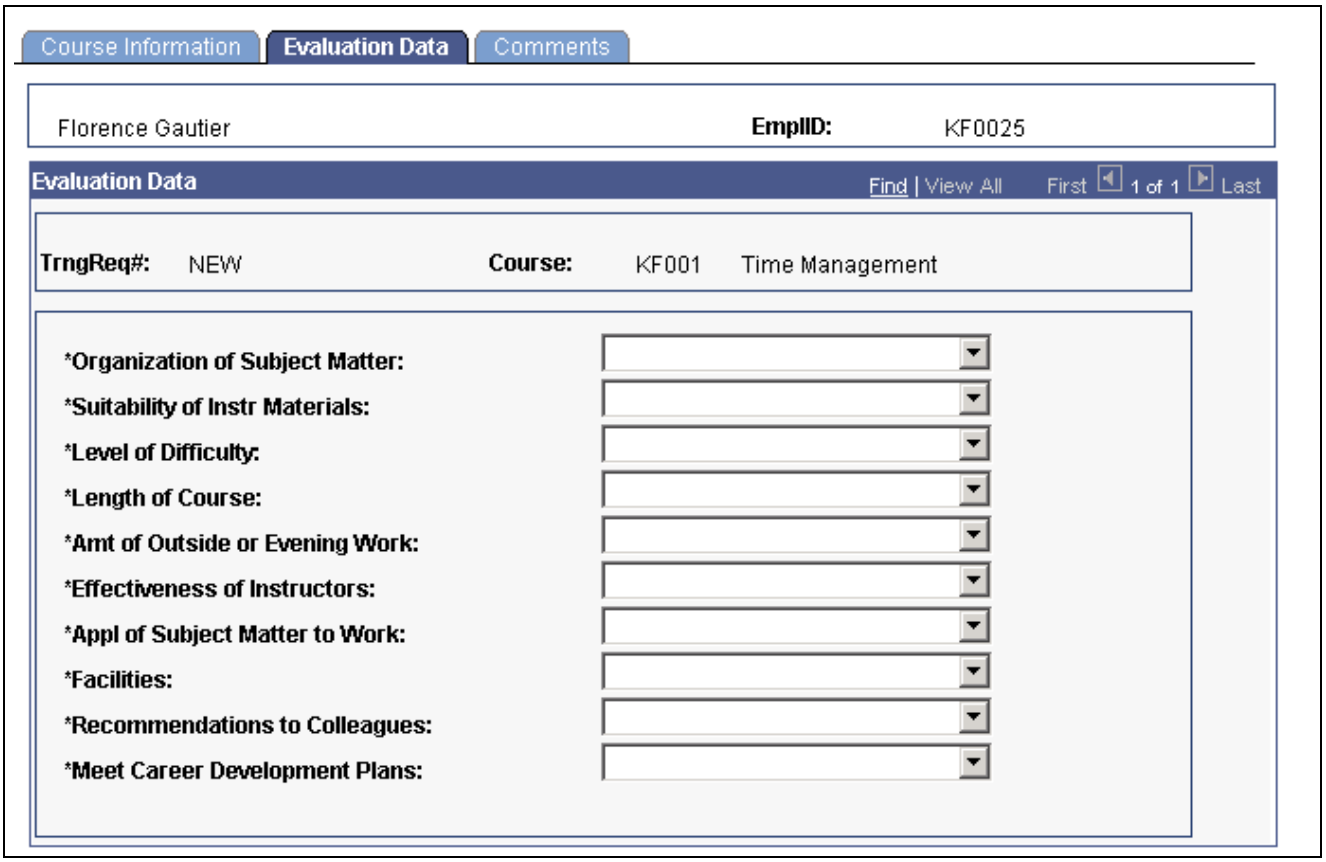
Duty Enter the number of hours in training that are normally spent at work.

Non-Duty Enter the number of hours spent in training or required for travel outside of duty hours.

Recording Specific Employee Feedback

Access the Individual Training Evaluation - Evaluation Data page.

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Individual Training Evaluation - Evaluation Data page

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

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Running Course Session Reports

This section discusses how to generate reports of scheduled course sessions.

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Pages Used to Run Course Session Reports

Page Name	Object Name	Navigation	Usage
Course Session Roster	RUNCTL_TRN002	Enterprise Learning, Course Reports, Course Session Roster, Course Session Roster	Lists the course name, session number, session start date, and all students who are enrolled in a course. This is a Crystal report.
Training Schedule	RUNCTL_TRN004	Enterprise Learning, Training Reports, Training Schedules, Training Schedule	Lists course sessions that are scheduled within a given period. This is a Crystal report.
Training Facility Schedule	RUNCTL_TRN005	Enterprise Learning, Training Reports, Training Facility Schedules, Training Facility Schedule	Lists course sessions scheduled at a training facility during a given period. Sessions are listed by course start date. This is a Crystal report.
Course Attendance Status	RUNCTL_TRN018	Enterprise Learning, Course Reports, Attendance Status, Course Attendance Status	Lists the attendance status of the students in a course. This is an SQR report.
Course Rating	RUNCTL_TRN017	Enterprise Learning, Course Reports, Course Rating	Details ratings for sessions of a course. This is a Crystal report.
Course Ratings Templates	RUNCTL_TRN019	Enterprise Learning, Course Reports, Course Rating Templates, Course Rating Templates	This evaluation template is completed by students enrolled in a course session. This is a Crystal report.
Course Statistics	RUNCTL_TRN022	Enterprise Learning, Training Reports, Statistics of EEs Enrolled, Course Statistics	Lists the employees who are enrolled in courses and lists course statistics by company, location, and department. This is an SQR report.
Training Instructor Schedule	RUNCTL_TRN033	Enterprise Learning, Training Reports, Training Instructor Schedules, Training Instructor Schedule	Lists the courses that an instructor is scheduled to teach during a given period. This is a Crystal report.
Equipment Checklist	RUNCTL_TRN034	Enterprise Learning, Training Reports, Equipment Checklist, Equipment Checklist	Lists required equipment for a course session. For each item, the report shows the quantity required, the number available in the training room and facility, and the total number that is booked at the facility for a given period. This is an SQR report.

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CHAPTER 7

Enrolling and Wait-Listing Students

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

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

Understanding Student Enrollment Options

This section lists common elements and discusses enrollment methods.

Common Elements Used in This Chapter

First, Previous, Next, and **Last**	Click to display another group of student IDs.
Refresh Search Fields	Click to clear the search criteria that you entered on the Name or ID Search page.
Search on Name or ID	Click to access the Name or ID Search page and filter students by name or ID.
DIF	Individual Training Rights *(Droit Individuel a la Formation)*. Select this check box to calculate how many hours the employee gets for training purposes, according to his seniority, contract type and working hours.
Training Out of Working Hours	Specify the number of hours a student spends outside their work schedule.
Training Plan Category	Select a training plan category. The values are: Skill Development, Adaptation to Job Changement, Job Preservation, Not Specified.

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Enrollment Methods

Enrollment options enable you to:

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

Note. When you use the Enroll by Department Demand, Enroll by Employee Demands, or Group Enroll components, students with a wait-list status also appear in the course waiting list, and students with an enrolled status appear on the Course Session Enrollment page.

For all enrollment options, you can generate standard letters to notify students when you enroll them in a course or reschedule or cancel a course session.

Generating Student Form Letters

This section discusses how to:

- Produce training letters.
- Run the training letter report.

Page Used to Generate Student Form Letters

Page Name	Object Name	Navigation	Usage
Training Letters	RUNCTL_TRN001	Enterprise Learning, Student Enrollment, Create Training Letters, Training Letters	Produce training letters.

Producing Training Letters

You can automatically generate a variety of student form letters. PeopleSoft Enterprise Human Resources delivers samples of the following types of training letters:

- Confirmation of course session enrollment.
- Notification of course session rescheduling.
- Notification of course session cancellation.

To generate training letters:

1. Review (and update as needed) the letter codes on the following pages for students to whom you'll send letters:
   - Course Auto Enroll (course automatic enrollment).
   - Course Session Enrollment.
   - Express Rescheduling.
   - Course Wait List.

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- Student Training.

  Review letter codes for in-house courses on this page. Once student records have letter codes, you can generate form letters anytime.

2. Run the Training Letters report to generate form letters containing student data.

   You can run the report for all course sessions that are scheduled within a defined period, for course sessions of a specified course within a defined period, or for one course session.

   This report runs three processes:

   - A Structured Query Report (SQR) to extract data from Human Resources.

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

   - A Microsoft Word for Windows macro to merge the data into a form letter template.
   - A PeopleSoft Application Engine process that sends training letters by email to students who have an email address.

     See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Generating Form Letters".

3. Print the training letters using Microsoft Word for Windows.

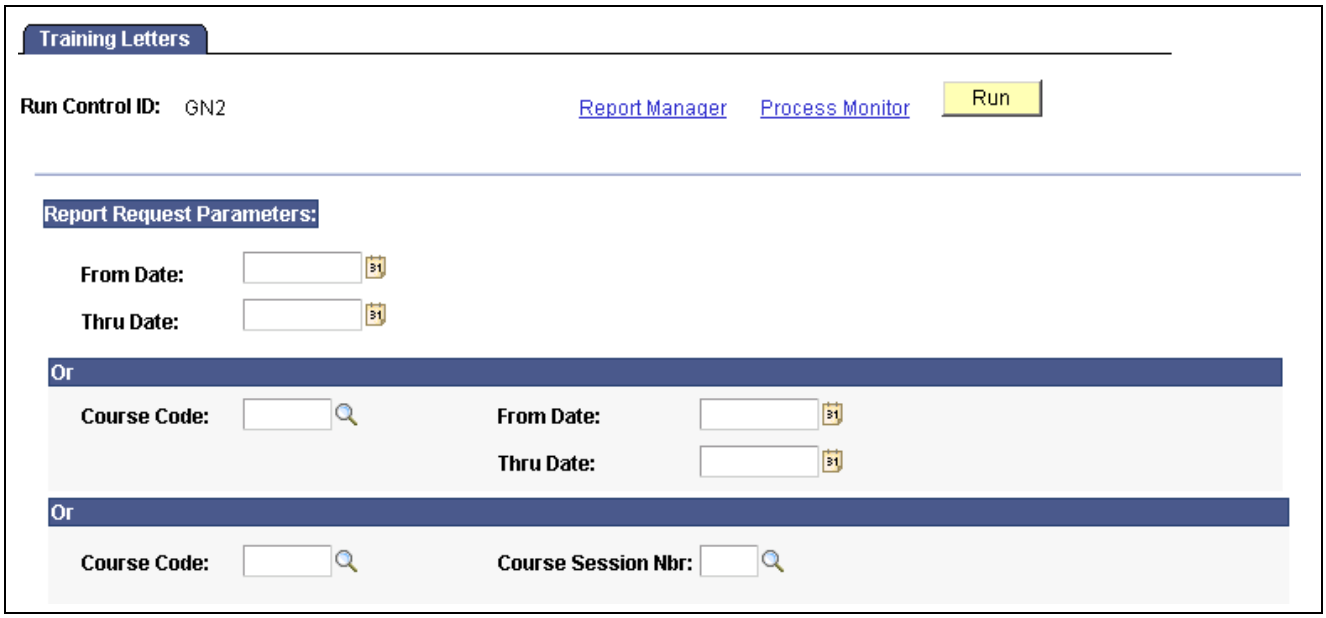
   The system creates the form letters in a temporary directory on the application server, putting all letters of the same type in one file.

Note. So that employees can receive training letter emails, course sessions must be defined with facility and room information.

Running the Training Letters Report

Access the Training Letters page.

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Training Letters page

From Date and **Thru Date** (through date)

Enter the start and end date to generate letters for all course sessions within a period.

Course Code

Enter the course code to generate letters for a specified course. Enter information in either:

- The From Date and Thru Date fields, to print letters of all sessions in the period.
- The Course Session Nbr (course session number) field, to print letters for a single session.

Run

Click the Run button to display the Process Scheduler Request page.

- Select the Email Training Letters process (TRN001-J) (process type PSJob) if you want PeopleSoft Process Scheduler to automatically run the processes sequentially. The process:
  1. Runs the SQR report process to extract data.
  2. Initializes Winword.
  3. Runs the Application Engine that calls the Microsoft Word macro to merge the data.
  4. Runs the Application Engine process that sends email training letters to students with email addresses.
- Select Training Letters process (TRN001DG) (Process Type PSJob) to create the letters without mailing them. To run the PSJob Training Letters process properly, at the first step of the PSJob (the SQR Report), select *File* in the Type File field and *LP* in the Format field. The PSJob generates the letters into the third step (PSMERGE). Then run the Application Engine process for emails.
- Select the Training Letters Data Extract process (TRN001) (process type SQR Report) to create the data file in order to check the extracted data. Select *File* in the Type field and *LP* in the Format field. Then run the

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Application Engine process for emails. The file is posted on the web server, on the Report Repository.

No matter the output destination that you specify on Process Scheduler, the system always sends the data extract files and the form letter to the Report Repository. Use Word for Windows to print the letters. Always run the Email Training Letters and Training Letters PSJobs on with the Process Scheduler set for WinWord processes.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Generating Form Letters," Using Naming Conventions in Form Letter Files

Enrolling Students Manually

Enrolling individual students is useful if you create course sessions before students request enrollment.

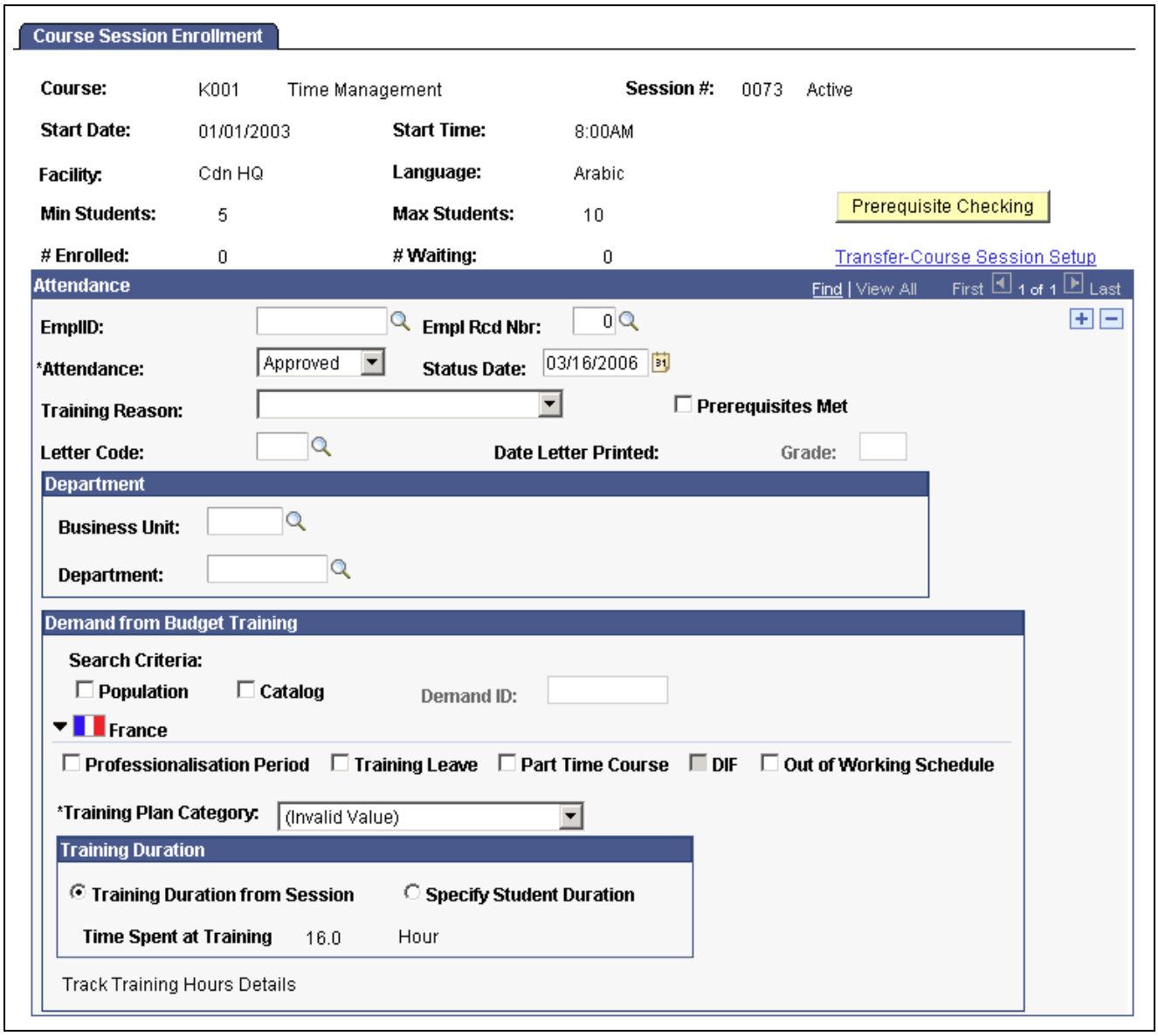
Pages Used to Enroll Students Manually

Page Name	Object Name	Navigation	Usage
Course Session Enrollment	COURSE_ENROLLMENT	Enterprise Learning, Student Enrollment, Enroll Individually, Course Session Enrollment	Enroll individual students, add them to a course session waiting list, and adjust to existing subscriptions. Check the results of the automatic enrollment. To adjust several student subscriptions, use the Course Auto Enroll page.
Employee Training Request Data (USF)	GVT_TREQ_DATA_A	Click the Trn Request (training request) button on the Course Session Enrollment page.	(USF) Enter employee training request data including purchase order information, direct and indirect cost appropriation, and billing instructions.

Enrolling Individual Students

Access the Course Session Enrollment page.

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Course Session Enrollment page

Note. You can only access sessions for which the Session Administration check box is selected on the Course Session Profile page.

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

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

Transfer-Course Session Setup Click to access the Course Session table.

See Chapter 2, "Defining Training Courses and Programs," Setting Up Courses, page 25.

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Attendance

Attendance

Select the student's status:

Enrolled: Enroll a student in the session.

If you enroll more than the maximum number of students allowed in the session, you get a warning message when you save the page.

Sessn Wait (session waitlist): Add a student to a session waiting list.

You can change a student's status to any value except *Crse Wait* (course waitlist). To add a student to a course waiting list, use the Course Wait List page. To change a student's status to *Crse Wait,* use the Student Training - Course Student Enrollment page.

(USF) *Request:* For U.S. federal users only. Use to enter a training request. When you've entered the training request data, PeopleSoft Workflow routes the request and tracks the process from *Request* to *Authorized* to *Enrolled* or *Waitlisted.*

Status Date

Displays the system date, usually today's date, as the initial value, which you can change.

Waitlist Entry Date (waitlist date)

Enter the waiting list date if the student is on a session waiting list. The system hides this field when the student is enrolled in a training course.

Training Reason

Select a reason for the training.

Prerequisites Met

If you identified prerequisites on the Course Table - Prereqs, Goals page, the system selects this check box if the student has met all of the prerequisites. Otherwise, you can select the box manually.

Letter Code

Enter a letter code to generate a form letter. Values are:

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

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

Date Letter Printed

Displays the date once you generate the letter.

Grade

Appears when the student's status is *Completed.*

Department

Business Unit and **Department**

The system populates these fields from the employee's job data record. If you've enrolled a nonemployee in a course session, the nonemployee's business unit information comes from the information that you entered in the Add Non-Employee component.

(USF) Training Request Data

U.S. federal users can request a training session and track student training processes, such as accessing student data, maintaining student training data, viewing training summary information, tracking student tuition reimbursement, and reviewing training-related employee data.

Trn Request (training request)

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

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Trn Request Button (training request) (USF) Click to access the Employee Training Request Data page and enter additional information.

Print SF182 Icon (USF) Click to print the training request form (SF-182). The form is printed after you have completed and saved the request information.

Demand from Budget Training

In this group box, you link enrollments with a training demand that you defined in the Budget Training business process. With this link, the system can compute the ratio between the projected costs in the Budget Training business process and the actual costs that you track in the Human Resources Administer Training business process.

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

If selected, the system displays all Budget Training demands with the following restrictions:

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

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

If you select this check box and prompt for a demand ID, the system displays all Budget Training demands with the following restrictions:

- The course session start and end dates must be in the budget period of the demand.
- When the demand course value is *UNKNOWN,* the demand subcategory must include the current course.
- When the demand course value is *not UNKNOWN,* the demand course must be the same as the current course.
- When the course and the subcategory values for the demand are *UNKNOWN,* the demand category must include the current course.

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

- The course session start and end dates must be in the demand budget period.
- For individual demands, the employee ID of the demand must be the same as the student ID for the enrollment.
- For general demands, the student ID of the enrollment must be on both the Demand Department list and the Demand Job list.

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- When the demand course value is *UNKNOWN,* the demand subcategory must include the current course.
- When the demand course value is *not UNKNOWN,* the demand course must be the same as the current course.

Demand ID Displays the budget training demands that match the criteria (when you select the search criteria).

(FRA) France

For French companies, enter the additional enrollment information that is required for French Training report (2483).

Professionalisation Period Select if course enrollment occurs as part of a professionalization contract.

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

Part Time Course Select if you're enrolling the employee in a sandwich course, where the employee gains work experience while studying.

DIF Select to activate the DIF fields on the Training Hours Details secondary page.

When this check box is selected, the system sets the Session Cut DIF Duration on the secondary page to the Session Cut Duration for all session cuts that have a status of Awaiting Review. When the check box is cleared, the DIF related rows are hidden on the secondary page and all DIF values are set to zero.

Out of Working Schedule Select to track enrollments out of the working schedule that trigger training allocation payments from the payroll system.

There are two allocations for training out of the working schedule: one is for DIF training, and the other is for skills development training.

When this check box is selected, the *Duration out of Working Schedule* field on the Training Hours Details page is set to the Session Cut Duration for all session cuts that have a status of Awaiting Review.

Note. . If you select Out of Working Schedule but do not select DIF, you must set the Training Plan Category to *Skills Development* to enable allocations from the payroll system.

Note. The system automatically prevents you from changing the DIF and Out of Working Schedule options when all session cuts in a training session have a status other than *Awaiting Review*.

See Also

Chapter 7, "Enrolling and Wait-Listing Students," Producing Training Letters, page 140

Enrolling Students by Department Demand

This section discusses how to:

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- Enroll students by department.
- View subscribed employees.

See Also

Chapter 4, "Defining Training Requirements," Defining Employee Training Demands and Demand by Course, page 79

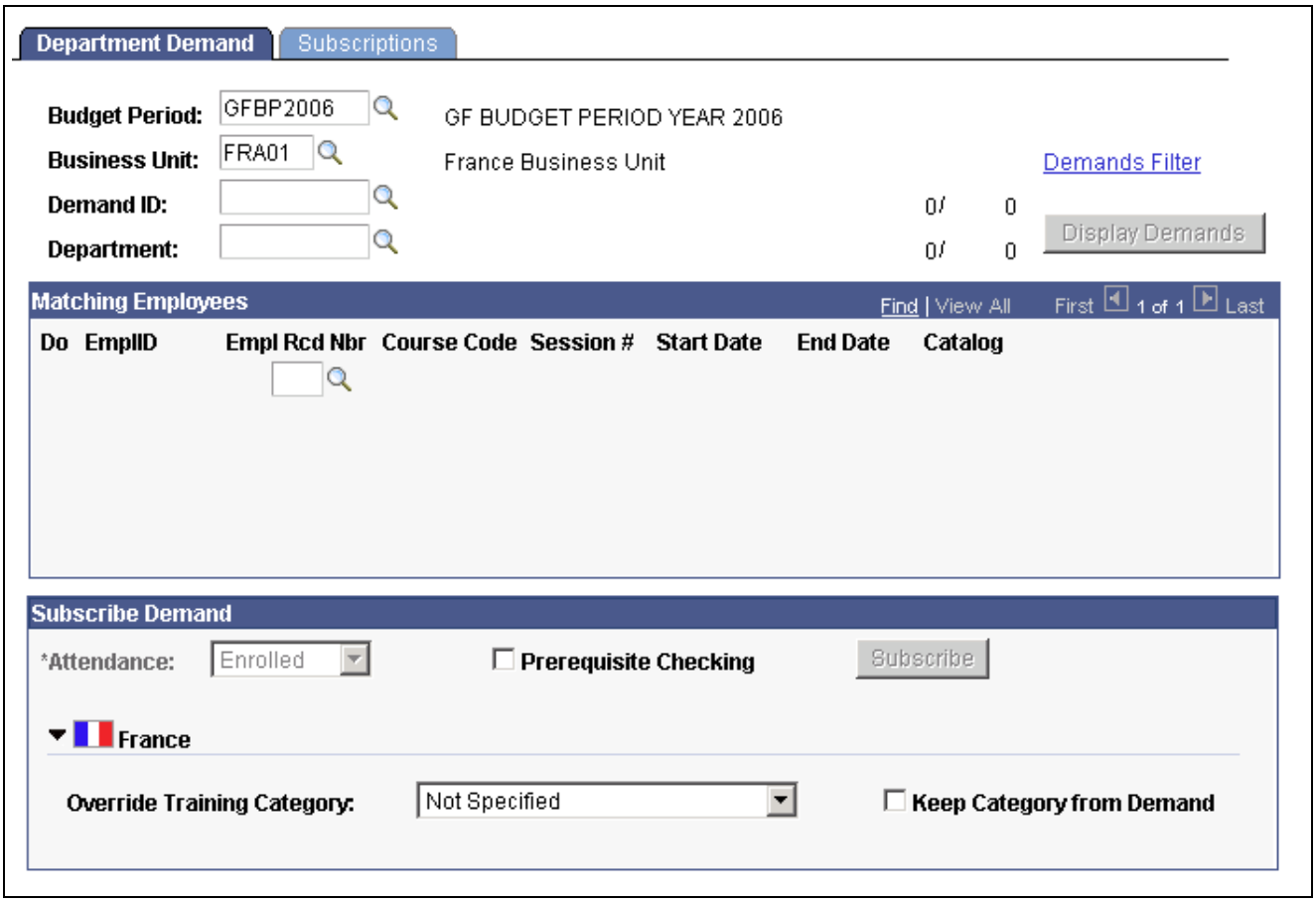
Pages Used to Enroll Students by Department Demand

Page Name	Object Name	Navigation	Usage
Department Demand	TRN_GNRL_DMND_SUBS	Enterprise Learning, Student Enrollment, Enroll by Department Demands, Department Demand	Enroll students (employees who qualify for training according to a set criteria) in a course session. Add students (who are included in a department demand) to a waiting list.
Department Demand - Demands Search Criteria	TRN_GN_DMND_CR_SEC	Click the Demands Filter link on the Department Demand page.	Limit the selection to a specific course or courses within a particular category or subcategory. List employees who have subscribed to a training course and who belong to the specified business unit and department for sessions that occur within the budget period.
Department Demand - Employee/Course Details	TRN_GN_DMND_SEC	Click the Details link on the Department Demand page.	View information about the course session that you selected on the Department Demand page.
Department Demand - Subscriptions	TRN_GNRL_TRAIN_SUB	Enterprise Learning, Student Enrollment, Enroll by Department Demands, Subscriptions	View subscribed employee information for students who successfully subscribed to the courses and sessions that you selected on the Department Demand page. Check their status and the course enrollment dates.
Subscriptions - Employee/Course Details	TRN_TRAINING_SEC	Click the Details link on the Enroll by Department Demands - Subscription page.	View information about the selected course session.

Enrolling Students by Department

Access the Department Demand page.

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Department Demand page

Budget Period Enter the budget period for the department demand to enroll in a course session.

Demand ID Enter the demand ID to include in the enrollment process. The training demand includes information about the course in which students should be enrolled, course category classifications, budget period dates, and employee qualification criteria.

Department Enter the department code for the students to enroll in a session. You can select only from the departments that are included in the demand ID that you specified. When you move out of the Department field, the system makes the Display Demands button available.

Demands Filter To limit the search further, click this link to access the Demands Search Criteria page and specify a category or subcategory from the training catalog. You can also specify a course and approved demands only.

To limit demands using selection criteria after you click the Display Demands button, cancel the page and start again.

Display Demands Click to populate the Matching Employees group box with employees who meet the selection criteria (such as department and job codes) that are defined in the demand ID.

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Matching Employees

Do — Select this check box to enroll or wait-list an employee for the selected course or session.

Course Code — Select the course the employee is to attend. The initial value is the department demand ID that you selected.

Session # (session number) — Select a session number for the selected course code. You must select a session within the budget period for this demand.

When you move out of this field, the system displays the start and end dates of the session and selects the Catalog check box if the session is in the training catalog.

Details — Click to access the Department Demand - Employee/Course Details page and view the employee's name and the details of the course session that you selected.

Subscribe Demand

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

Attendance — Select from one of the following valid statuses:

Crse Wait (course wait-listed), *Enrolled,* and *Sessn Wait* (session wait-listed).

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

Prerequisite Checking — Select to verify whether students have met the prerequisites for a course specified in the Course table. Students who haven't met the prerequisites won't be enrolled in the course when the system processes the request.

Subscribe — Click this button once you have selected the employees to enroll or add to the waiting list. Depending on the attendance value that you selected, the system enrolls or wait-lists students for whom you selected the Do check box.

(FRA) France

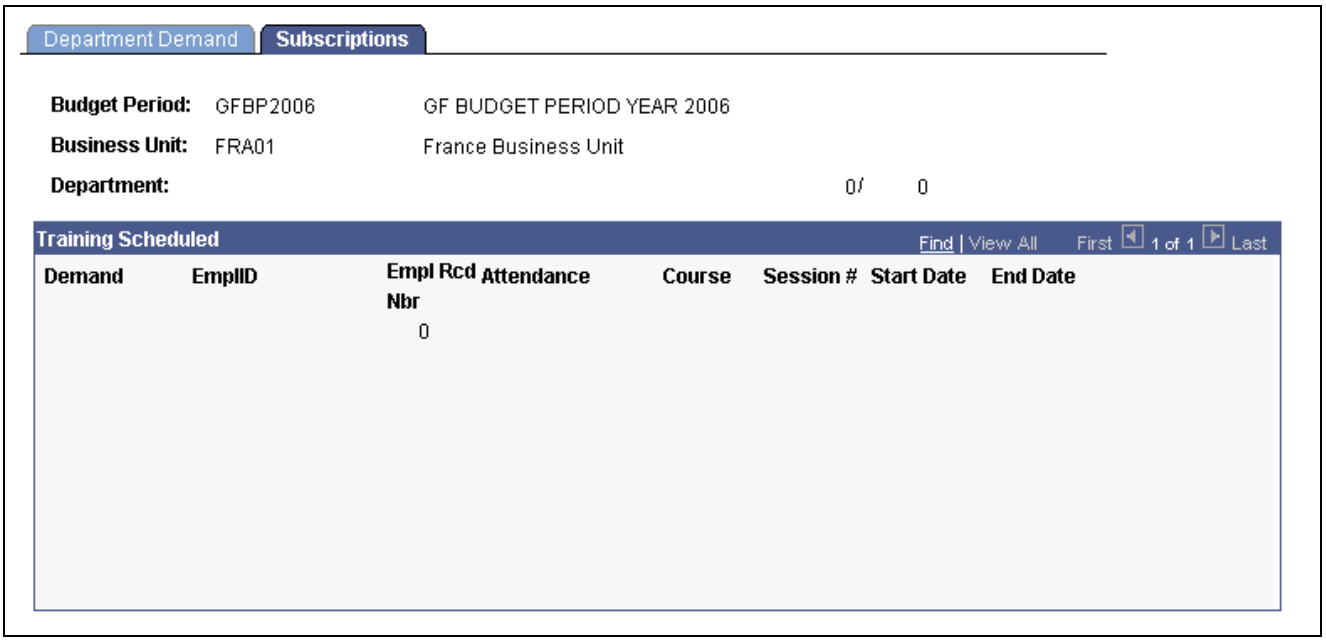
Override Training Category — To override the training category that is associated with the training demand, select the category here.

Keep Category From Demand — Select this option to retain the training category that is associated with the training demand.

Viewing Subscribed Employees

Access the Enroll by Department Demands - Subscriptions page.

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Enroll by Department Demands - Subscriptions page

The system lists employees who were enrolled or wait-listed in the courses and course sessions that you selected on the Department Demand page.

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

Enrolling by Employee Demand

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

This section lists pages used to enroll by employee demand.

See Also

Chapter 4, "Defining Training Requirements," Methods of Determining Training Demand, page 62

Chapter 7, "Enrolling and Wait-Listing Students," Enrolling Students by Department Demand, page 147

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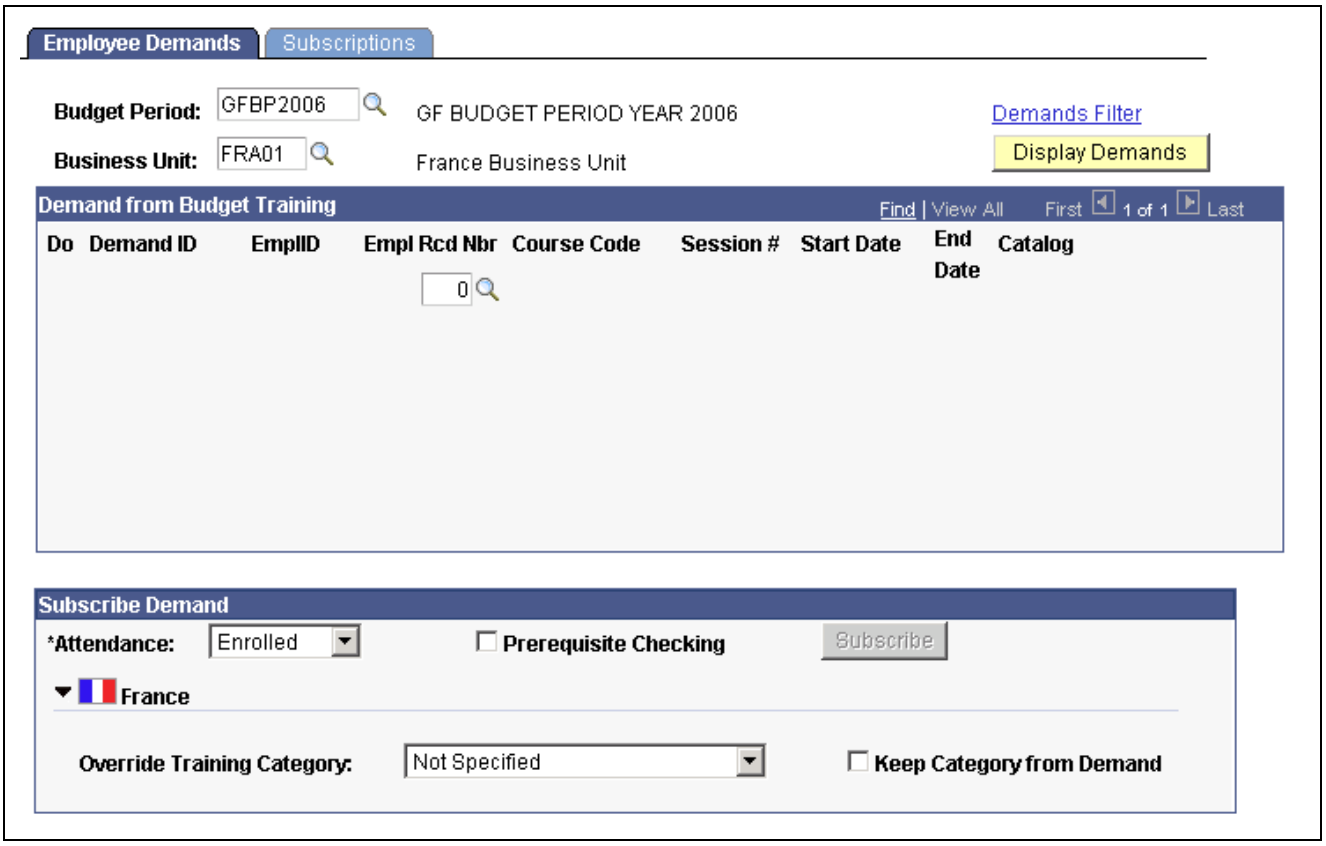
Pages Used to Enroll by Employee Demand

Page Name	Object Name	Navigation	Usage
Employee Demands	TRN_EMPL_DMND_SUBS	Enterprise Learning, Student Enrollment, Enroll by Employee Demands, Employee Demands	Select approved employee demands to enroll in the requested courses. You set up courses on the Employee Demand Profile page or the Employee Demand Course page.
Employee Demands - Demands Search Criteria	TRN_EE_DMND_CR_SEC	Click the Demands Filter link on the Employee Demands page.	Limit the selection to a course or courses in a particular category or subcategory.
Employee Demands - Employee/Course Details	TRN_EE_DMND_SEC	Click the Details link on the Employee Demands page.	View information about the selected course session.
Employee Demands - Subscriptions	TRN_EMPL_TRAIN_SUB	Enterprise Learning, Student Enrollment, Enroll by Employee Demands, Subscriptions	View employees who successfully subscribed to the courses and sessions that you indicated on the Employee Demands page. Check status and course enrollment dates.

Specifying Employee Demand

Access the Employee Demands page.

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Employee Demands page

(FRA) France

Override Training Category Select this option to override an existing training category and assign a new one during enrollment.

Keep Category From Demand Select this option to retain the training category selected. Clear Keep Category from Demand to activate Override Training Category.

Enrolling Students by Group

This section discusses how to:

- Enroll or wait-list group members.
- View subscribed students.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Group Definitions"

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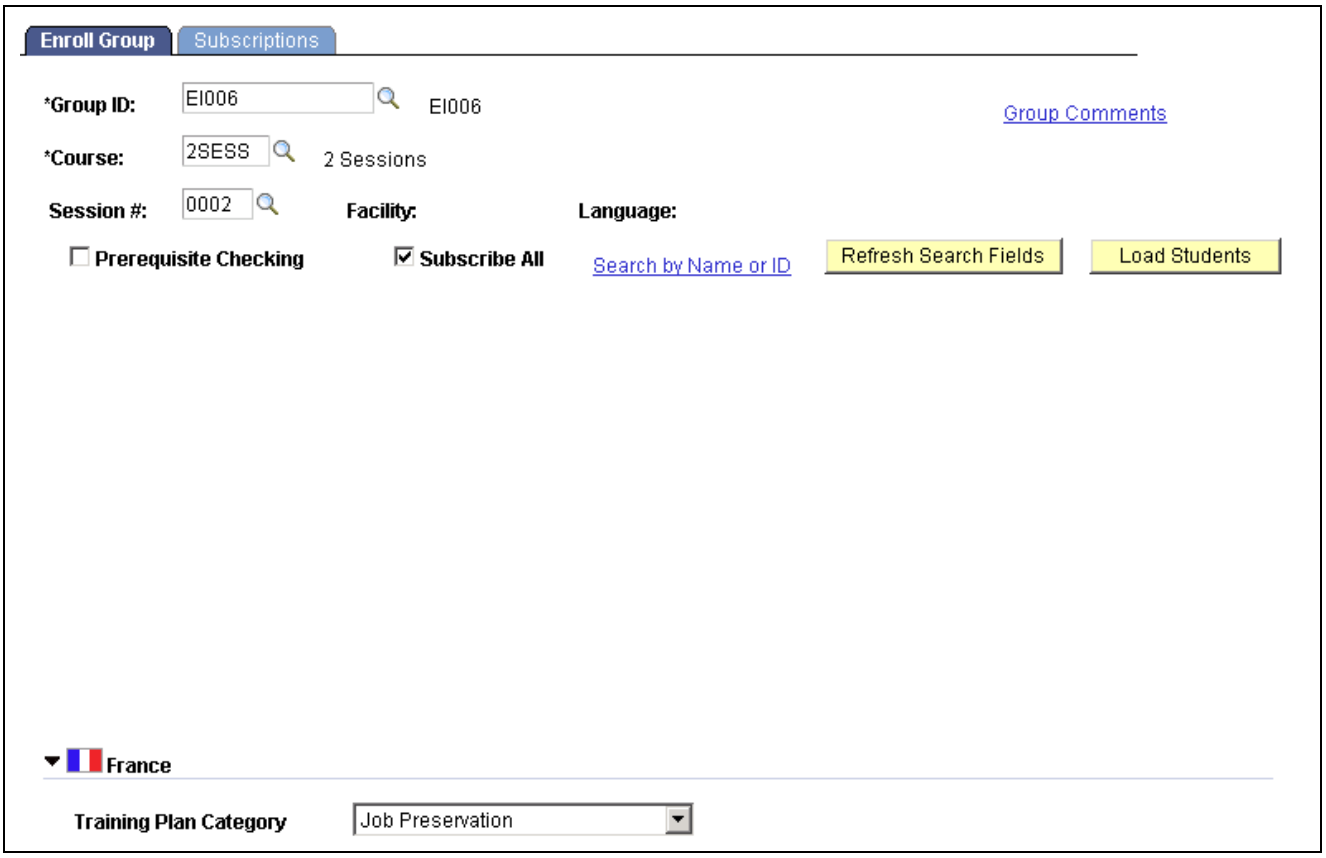
Pages Used to Enroll Students by Group

Page Name	Object Name	Navigation	Usage
Enroll Group	TRN_GRP_ENROLL_GBL	Enterprise Learning, Student Enrollment, Enroll by Group, Enroll Group	Enroll or wait-list group members to a course.
Comments	TRN_GRPDESCGBL_SEC	Click Group Comments on the Enroll by Group or Group Enrollment - Subscriptions page.	View a description of selected group and the criteria used to build the group.
Enroll Group - Name or ID Search	TRN_GRPSON1GBL_SEC	Click the Search by Name or ID link on the Enroll Group page.	Select members of the group to enroll or add to waiting lists.
Enroll Group - Employee/Course Details	TRN_GRP_ENRGBL_SEC	Click the Details link on the Enroll Group page.	View details of the course session for which the selected employee is enrolled or wait-listed.
Enroll by Group - Subscriptions	TRN_GRP_SUBS_GBL	Enterprise Learning, Student Enrollment, Enroll by Group, Subscriptions	View the students who were subscribed to the courses and sessions indicated on the Enroll Group - Employee/Course Details page.
Subscriptions - Name or ID Search	TRN_GRPSON2GBL_SEC	Click the Search on Name or ID link on the Group Enrollment - Subscriptions page.	Select the members of the group whose details you want to view.

Enrolling or Wait-Listing Group Members

Access the Enroll Group page.

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Enroll Group page

Group Comments Click to access the Comments page and view a description of the group and the group definition.

Course Displays the course name. If the course is multilingual, a message instructs you to select a course session.

Session # (session number) Enter a session in a language that is appropriate for the group. This field is required for multilingual courses that don't have course waiting lists.

Facility If you completed the Session # field, the system completes this field using values from the Course Session Table - Location, Instructor page. If you didn't specify a facility when you created the session, the field is blank. This field is unavailable for entry.

Language Displays the language. If you completed the Session # field, and the course is multilingual, the system completes this field from the Course Session table. This field is unavailable for entry.

Prerequisite Checking Select to verify whether students meet the course prerequisites. Students are added to waiting lists even if they don't meet the prerequisites, and you can decide if they should attend the course.

Subscribe All Select to select the Do check box for students who are listed in the Matching Employees scroll area.

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Student Batch Controls

The system loads students into this page in batches. You determine the number of rows in a batch in the Max Number of Rows in Scrolls (maximum number of rows in scrolls) field on the Installation Table - Third Party/System page. You manage the display of batches using filters and navigation buttons. Filters enable you to enter search criteria for identifying a group of students.

Click the Search by Name or ID link to access the filter fields. After entering information in the filter fields, click the Load Students button to populate the page with the IDs of students who meet the search criteria.

Load Students Hides after the system populates the Matching Employees scroll area and appears again when you select new search criteria or click the Refresh Search Fields button.

Matching Employees

When you click the Load Students button, the system populates the Matching Employees scroll area with students who match the search criteria that you entered. The system indicates visible rows compared to the total number of rows. For example, *12 to 20 of 56* means that rows 12 to 20 appear out of a total of 56 rows.

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

Do Select to update the selected student's training data with the current data. For example, if you set the attendance field value to *Enrolled* and complete the session details, the system enrolls the student only if the Do check box is selected. The system ignores the rows of data where the Do check box is cleared.

Student ID Displays the employee or nonemployee ID. To display the student's full name, click the Details link.

Course Displays the course code that you selected. To select a different course for the group, update the Course field at the top of the page and rerun the search.

Session # (session number) Displays the session number in this field if a student's attendance field value is *Enrolled* or *Sessn Wait*. You can change the course session without affecting other students in the list.

For students with an Attendance field value of *Crse Wait,* this field appears blank. To add the student to a course session, select the session from the list. When you move out of the field, the system clears the Attendance field; you must set it to *Sessn Wait* or *Enrolled.*

If the student has completed the course, the system displays the session number and makes the field unavailable.

Start Date and **End Date** If the student's attendance field value is set to *Enrolled, Sessn Wait,* or *Completed,* the system populates these fields from the Course Session table and makes them unavailable.

Already Subscribed Appears selected if a student has already been enrolled in a course session or added to a waiting list through the Group Enrollment component. The check box is for information only; you can still change the subscription information on the page. For example, if a student has been previously added to a course waiting list, you can add the student to a session waiting list from this page by updating the Attendance and Session # fields.

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If you subscribed the student using a different option (for example, if you used Course Session Enrollment to enroll the student manually), the system doesn't select this check box. You can't modify the Attendance or the Session # fields for that student.

Attendance Displays the Attendance field value from the student's training records if a student is wait-listed for the course, enrolled in a course session, or has completed the course. If the course isn't included in a student's training records, the system sets this field's value. Values are:

Crse Wait: The student is on the course waiting list. The system uses this value if the student hasn't been enrolled or wait-listed for the course and the Session # field is blank. To enroll or add the student to a session waiting list, select *Enrolled* or *Sessn Wait* and optionally complete the Session # field.

Enrolled: The student is enrolled in the selected course session. When you first click the Load Students button, the *Enrolled* field value appears only if the student was previously enrolled in the course session (the system doesn't enroll students on this page).

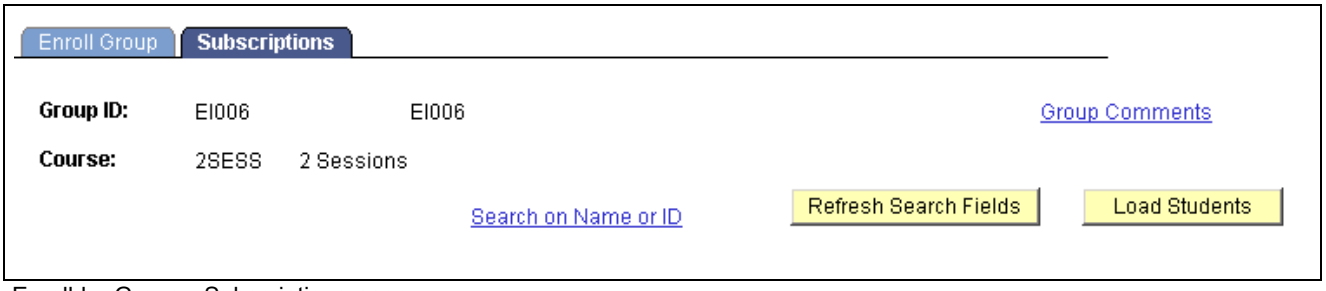
Sessn Wait: The student is on the course session waiting list. The system uses this value if a student hasn't been enrolled or wait-listed for the course, and you specify a session number. To enroll the student in the session, select *Enrolled.* If you have reached the maximum number of students for the course session, you receive a warning message.

Completed: The student has completed the course. Once a student has completed a course, you can't enroll that person in the course again, and all fields in that row are unavailable. You can't select *Completed* on this page. You need to update the course session status on the Course Table - Course Profile page.

Student/Course Details Click to access the Employee/Course Details page and view the student's full name and the course session details.

Viewing Subscribed Employees

Access the Enroll by Group - Subscriptions page.



Enroll by Group - Subscriptions page

Group Comments Click to access the Comments page and view a description of the group and the group definition.

Student Batch Controls

The system loads students into this page in batches, similar to the Enroll Group page.

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Training Scheduled

When you click the Load Students button, the system populates the Training Scheduled scroll area with students who match the search criteria that you entered. The system indicates visible rows compared to the total number of rows. For example, *12 to 20 of 56* means that rows 12 to 20 appear out of a total of 56 rows.

Prerequisites Met If you selected this check box on the Enroll Group page, the system verifies whether students have met the course prerequisites. When you access the Subscriptions page, the system selects this check box if the student has met the course prerequisites and clears it if the student has not.

Set up course prerequisites on the Course Table - Prereqs, Goals page (course table - prerequisites, goals page).

Managing Waiting Lists

This section discusses how to:

- Add students to waiting lists.
- Enroll students automatically.

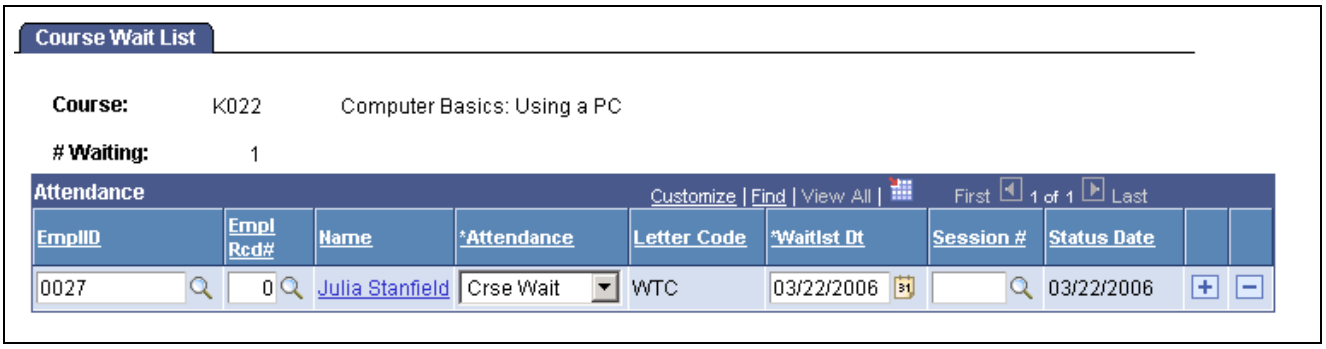
Pages Used to Manage Waiting Lists

Page Name	Object Name	Navigation	Usage
Course Wait List	COURSE_WAIT_LIST	Enterprise Learning, Student Enrollment, Create/Update Course Wait List	Add students to waiting lists and assign the enrollment status.
Course Waitlist Details	CRSE_WAITLIST_SEC	Click the student's name on the Course Wait List page.	View details of the course or course session for which the selected student is wait-listed.
Course Auto Enroll	COURSE_AUTO_ENROLL	Enterprise Learning, Student Enrollment, Course Session Auto Enrollment, Course Auto Enroll	Enroll students in a course session automatically.

Adding Students to Waiting Lists

Access the Course Wait List page.

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Course Wait List page

You can add employees and nonemployees to a waiting list. Insert additional rows to add students.

Name Displays the name when you select the employee ID. Click the student's name to access the Course Waitlist Details page and view more information about the selected course session.

Attendance Values are:

Crse Wait: Enroll the student in any session of the course that becomes available. You haven't set up any open sessions for the student to request.

Sessn Wait: Wait-list the student for a particular course session. To select this status, you must have created the session in the Course Session table and given it a status of *Active.* Students with a *Sessn Wait* status have priority over students with a *Crse Wait* status.

Note. For multilingual courses, you must use *Sessn Wait* and select a session in the student's language.

Letter Code Displays a default letter code according to the student's waiting list status. For wait-listed students, the letter code is WTC; for session wait-listed students, it is WTS. If you've created waiting list form letters, you can generate the letters once you save the information that you've entered on this page. Create letter codes on the Standard Letter Table page.

Waitlist Dt (wait list date) Displays the wait list date. You can override this value if the student has requested the course on a different date. The system uses this date to enroll students, from the oldest date to the most recent.

The system sorts students by session number in ascending order. Within each session, it sorts students by status (session wait list first and course wait list second), wait-list date, and ID. Nonemployees appear after employees, using the same sort sequence. The system also uses this sequence for automatic enrollment.

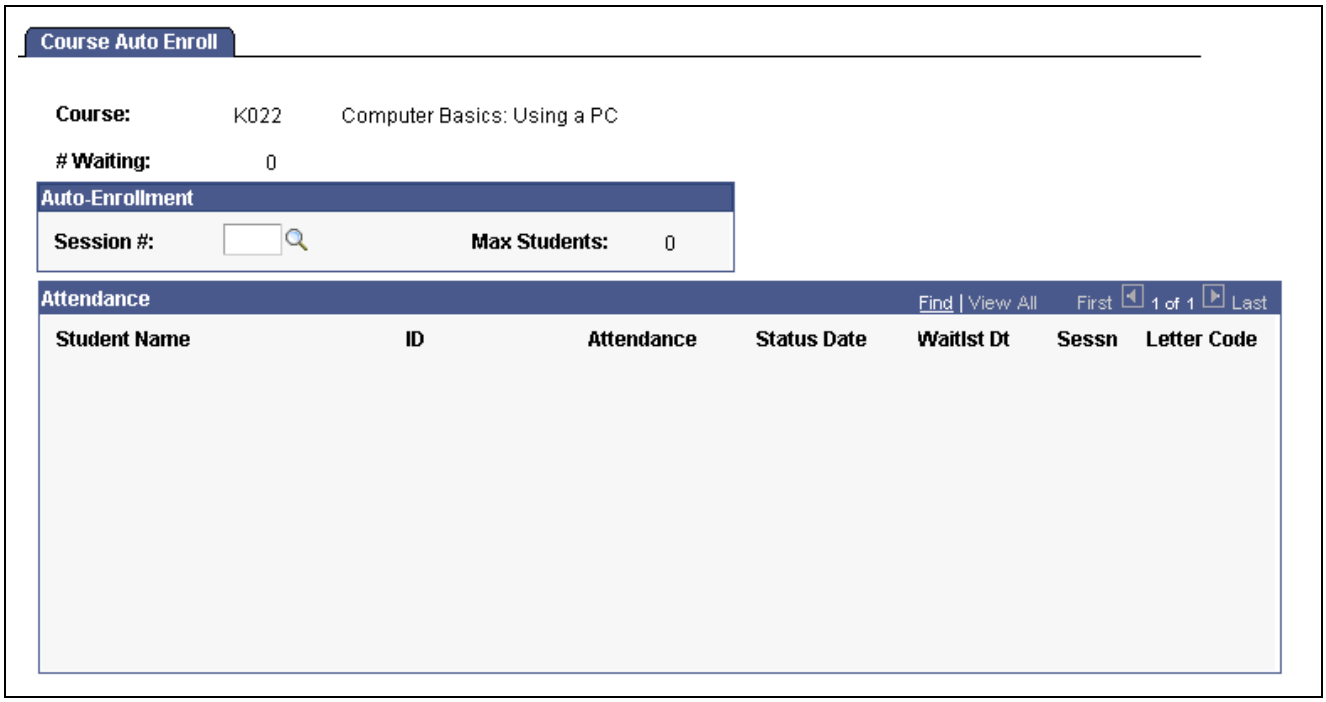
Session # (session number) Enter a session number if you selected an attendance value of *Sessn Wait.* When you leave this field, the system completes the Start Date, Facility, and Language (if it's a multilingual course) fields.

Status Date Displays the system date, usually the current date.

Enrolling Students Automatically

Access the Course Auto Enroll page.

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Course Auto Enroll page

Before you can enroll students in course sessions, you must have already created the session in the Course Session table, given it a status of *Active,* and entered a maximum number of students per session.

If you've set up lists for students who are waiting for courses or sessions, you can streamline the enrollment process by using automatic system enrollment.

When a student is automatically enrolled and you've given the student a status of *Sessn Wait* for several sessions of a course and one status of *Crse Wait,* the system deletes all the other data rows on the waiting list for this student for this course.

Note. If you're managing training budgets, the Course Auto Enroll process links costs to the appropriate department and demand in the Budget Training business process. This isn't necessarily the department in which the employee works, as specified on the job record, but it is the department to be billed for the employee's training costs.

Auto-Enrollment

Session # (session number) To start automatic enrollment, enter a session number.

When you move out of the field, the system issues one of two messages:

- If the session is full, then the message says that the session is overenrolled. Click OK and select another session number, or click Cancel.
- If the session isn't full, the message indicates how many slots are available in the session. Click OK. The system enrolls students up to the maximum number allowed for the session, as shown in the Max Students (maximum number of students) field.

The system first enrolls students with an acceptance field value of *Sessn Wait*(session wait) where the Sessn (session) field value matches the selected session number.

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Attendance

When you first access this page, the Attendance group box displays all employees and nonemployees who are on the session waiting lists or the course waiting list. Students are sorted using the same sequence as on the Course Wait List page.

Once you select a session number, the system updates student details. All students who are enrolled in the course session have a status of *Enrolled.* The system also displays a letter code value of *CON,* so that you can generate form letters informing students of their enrollment.

Once you've saved the Course Auto Enroll page, you can move to the Course Session Enrollment page to make any adjustments to the enrollees in this session.

See Also

Chapter 7, "Enrolling and Wait-Listing Students," Producing Training Letters, page 140

Moving Students Between Course Sessions

Use the Express Rescheduling component to review and update information about students who are enrolled in active course sessions or are on waiting lists. You can move students from one session to another, change their enrollment status, and designate a form letter to send. Although you can change student status, you can't add or remove students from a course.

This section lists pages used to move students between course sessions.

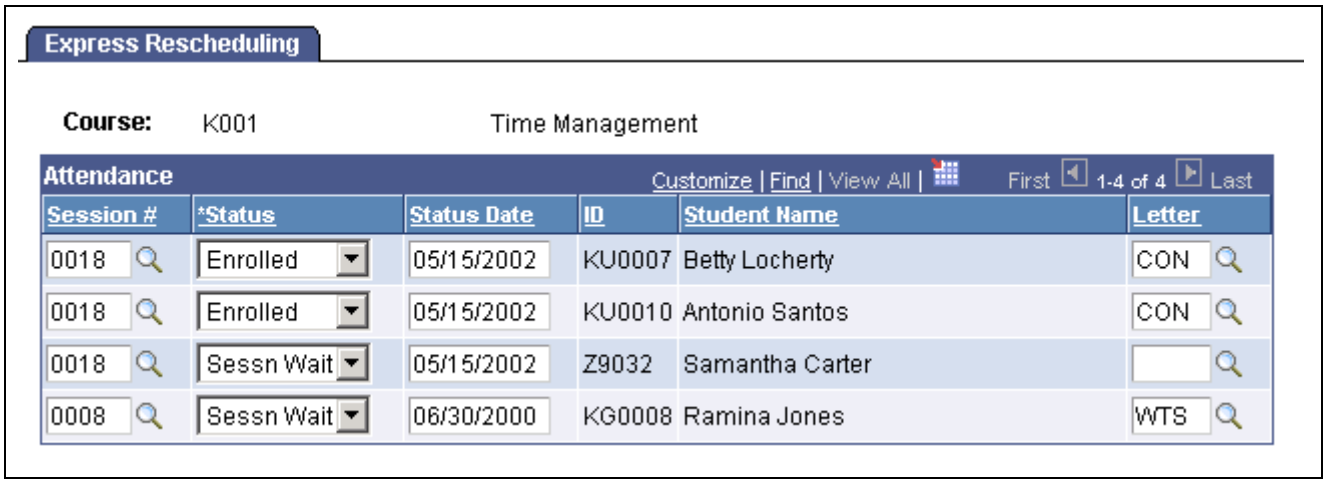
Page Used to Move Students Between Course Sessions

Page Name	Object Name	Navigation	Usage
Express Rescheduling	COURSE_RESCHEDULE	Enterprise Learning, Student Enrollment, Reschedule Between Sessions	Move students between course sessions.

Moving Students Between Sessions

Access the Express Rescheduling page.

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Express Rescheduling page

Session # (session number) Displays session numbers for enrolled or wait-listed students. To enroll a student in a session, select the session number.

Status Values are:

Enrolled: Enroll a student in the session that you selected in the Session # field.

Crse Wait

Sessn Wait

Status Date When you select a different status for a student, the system updates this field.

Letter Code Changes according to the status. The next time that you generate training letters, the system creates a letter of the type that is defined by the letter code.

Note. If the number of enrolled students in a session exceeds the maximum number allowed, you receive a warning message.

See Also

Chapter 7, "Enrolling and Wait-Listing Students," Producing Training Letters, page 140

Running Enrollment and Waiting List Reports

This section lists pages used to run enrollment and waiting list reports.

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Pages Used to Run Enrollment and Waiting List Reports

Page Name	Object Name	Navigation	Usage
Runctl SF182	RUNCTL_SF182	Enterprise Learning, Training Reports, SF182, Runctl SF182	(USF) Provides a standardized mechanism for generating SF182 reports to request, authorize, and detail estimates costs and billing, as well as certify training programs for employees. This is an SQR report.
Course Waiting List	RUNCTL_TRN003	Enterprise Learning, Course Reports, Course Waiting List	Lists students on all waiting lists for a course. This is a Crystal report.

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CHAPTER 8

Tracking Student Training

This chapter provides an overview of tracking and discusses how to:

- Maintain student training data.
- (USF) Track federal training requests.
- Review training-related employee data.

Understanding Tracking

You can follow student progress in both internal and external (offsite) courses for both employees and nonemployees, such as contractors or temporary workers. You can review training-related employee data, including education and certifications, by viewing employee profiles that are managed using the Manage Profiles business process.

You can view training data for all students who have taken training courses or have other training data in the system.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Working with Languages," Working with Double-Byte Characters

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Managing Profiles"

Maintaining Student Training Data

This section discusses how to:

- Enter or review student and course information.
- Link a student's course information to a demand ID.
- Track and review requested courses.
- Search for competency training.

When you add students to waiting lists and enroll them in sessions that are administered in house, the system adds and updates data rows in the Student Training component. You can review and update that information.

To enroll or wait-list students in training course sessions, use the Course Waiting List page or the Student Course Enrollment - Course Session Enrollment page. When students have completed sessions, you can enter their course grades on this page.

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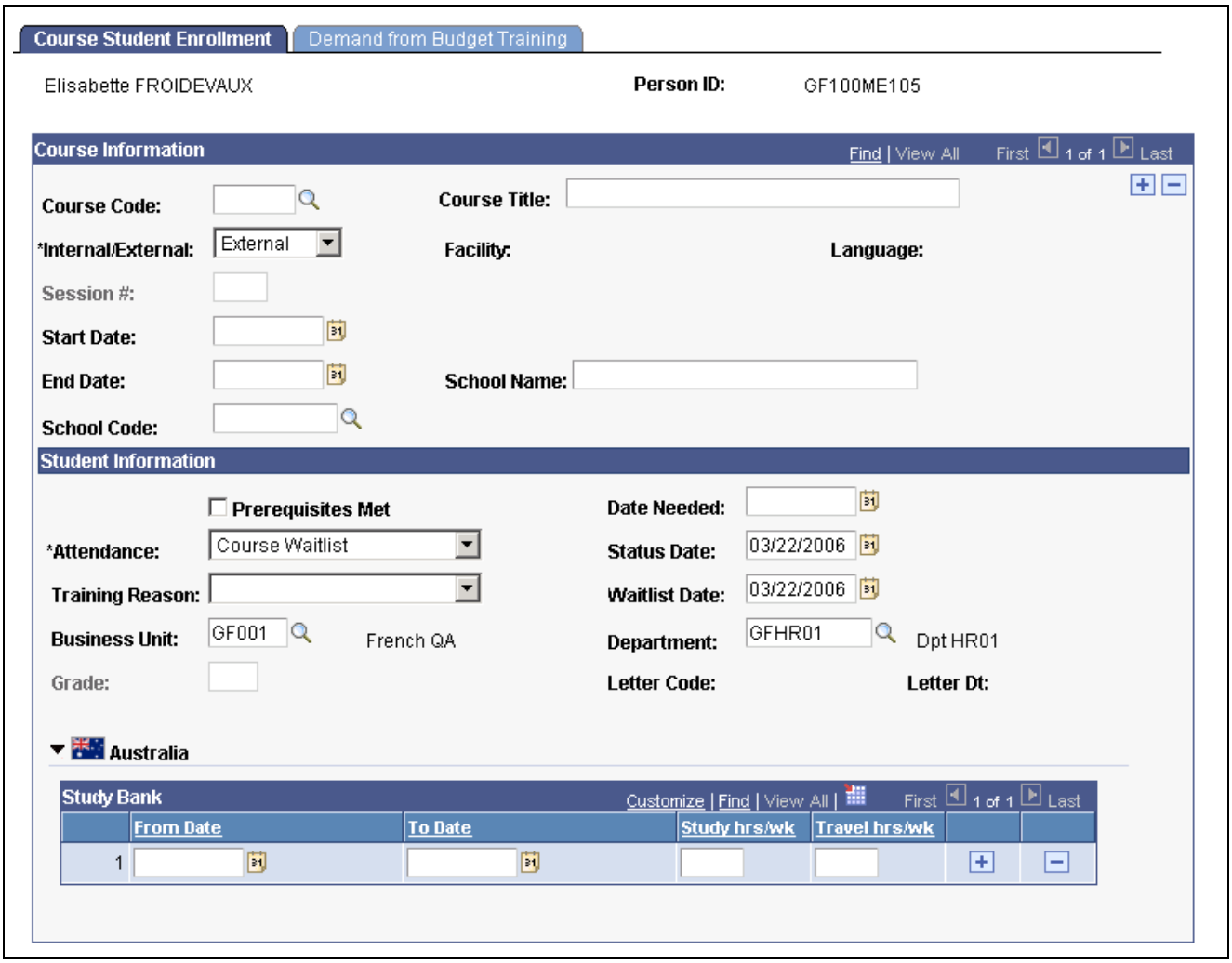
Pages Used to Maintain Student Training Data

Page Name	Object Name	Navigation	Usage
Course Student Enrollment , Training History	COURSE_STUDNT_ENRL	• Enterprise Learning, Student Enrollment, Enroll in Course, Course Student Enrollment • Workforce Development, Profile Management, Profiles, Training	Review or enter student and course information.
Demand from Budget Training	COURSE_STUDNT_ENR2	Enterprise Learning, Student Enrollment, Enroll in Course, Demand from Budget Training	Specify how a course that a student has completed or is enrolled in should be billed to a business unit and department.
Training Hours Details	TRN_DIF_ENROLL_SEC	Click the Track Training Hours Details link on the Demand from Budget Training page.	Track training durations for each training type (DIF, Non-DIF).
Student Training Summary	TRN_STUDNT_CRS_SUM	Enterprise Learning, Result Tracking, Review Training Summary, Student Training Summary	Review student training to determine whether students are receiving adequate training for their jobs or have taken course prerequisites. Useful for career and succession planning.
Competency Training	COMP_TRAINING	Workforce Development, Profile Management, Profiles, Review Competency Training	Search for training courses that address a selected competency.

Entering or Reviewing Student and Course Information

Access the Course Student Enrollment page.

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Course Student Enrollment page

Note. The Training History page accessed from Workforce Development, Profile Management is the same as the Course Enrollment page. However, the Demand from Budget Training page is not part of the Training History component.

Course Information

For course sessions that are administered in house, the system displays data from the Course Session table and Course Session Enrollment page and makes some fields unavailable.

To enroll the student in a course that you don't administer in house, insert a new row and fill in the fields.

Course Code and **Course Title**

If the course session is administered in house, the system displays these values.

If you're adding information about a course that is not administered in house, and if the course is in the Course table, select the course code. Otherwise enter the course name in the Course Title field.

Internal/External

Displayed if you entered a course code. If the value isn't displayed, select *Internal* or *External.*

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Facility, Language, Session #, Min, Max, # Enrolled, and **# Waiting** (facility, language, session number, minimum students, maximum students, number enrolled, and number waiting)

These fields apply only to course sessions that are administered in house.

Start Date, End Date, Start Time, and **End Time**

If dates and times aren't displayed, enter them.

School Name and **School Code**

Enter the name of the school if there is no corresponding school code.

Student Information

Prerequisites Met

Select to indicate that a student has met the required prerequisites or training before enrolling in a course.

Date Needed

Enter the date when the student should have completed this course.

Attendance

Displayed if the course session is administered in house. Changing the status may affect session enrollments, so go to the Course Session Enrollment page to make other adjustments, such as moving a student from the waiting list into the course. You can update the status of enrolled students to *Completed* here or on the Course Session Enrollment page.

If the course isn't administered in house, select an attendance status. The values that you'll use most often are *Currently Attending* and *Completed.*

If this training course is also in the employee career plan, once the status is *Completed,* the end date of the course appears in the Completion Date field on the Career Plan Career Training Plan page.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Plan Careers and Successions*, "Planning Careers," Reviewing Employee Career Data.

Status Date

Initially populated by the system date.

Waitlist Date

Displayed if the value in the Attendance field is *Course Waitlist* This field applies only to courses that are administered in house.

Business Unit and **Department**

These fields identify the business unit and department to which training is billed. You can change the default values.

The source of the default values is as follows:

- If the course is administered in house, the values come from the Course Session Enrollment page.
- If the course is administered outside of your organization and won't be administered using the Course Session Enrollment page or the course information is new (regardless of whether it is administered in house), the values come from the employee's job data record.
- If the student is a nonemployee (the nonemployee's business unit information comes from the Add Non-Employee component).

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Grade — If the student has completed the course, enter a grade.

Letter Code and **Letter Dt** (letter date) — If you printed a letter with the code that is specified in the Letter Code field, the system displays the date that the letter was printed. This field applies only to course sessions that are administered in house.

(AUS) Study Bank

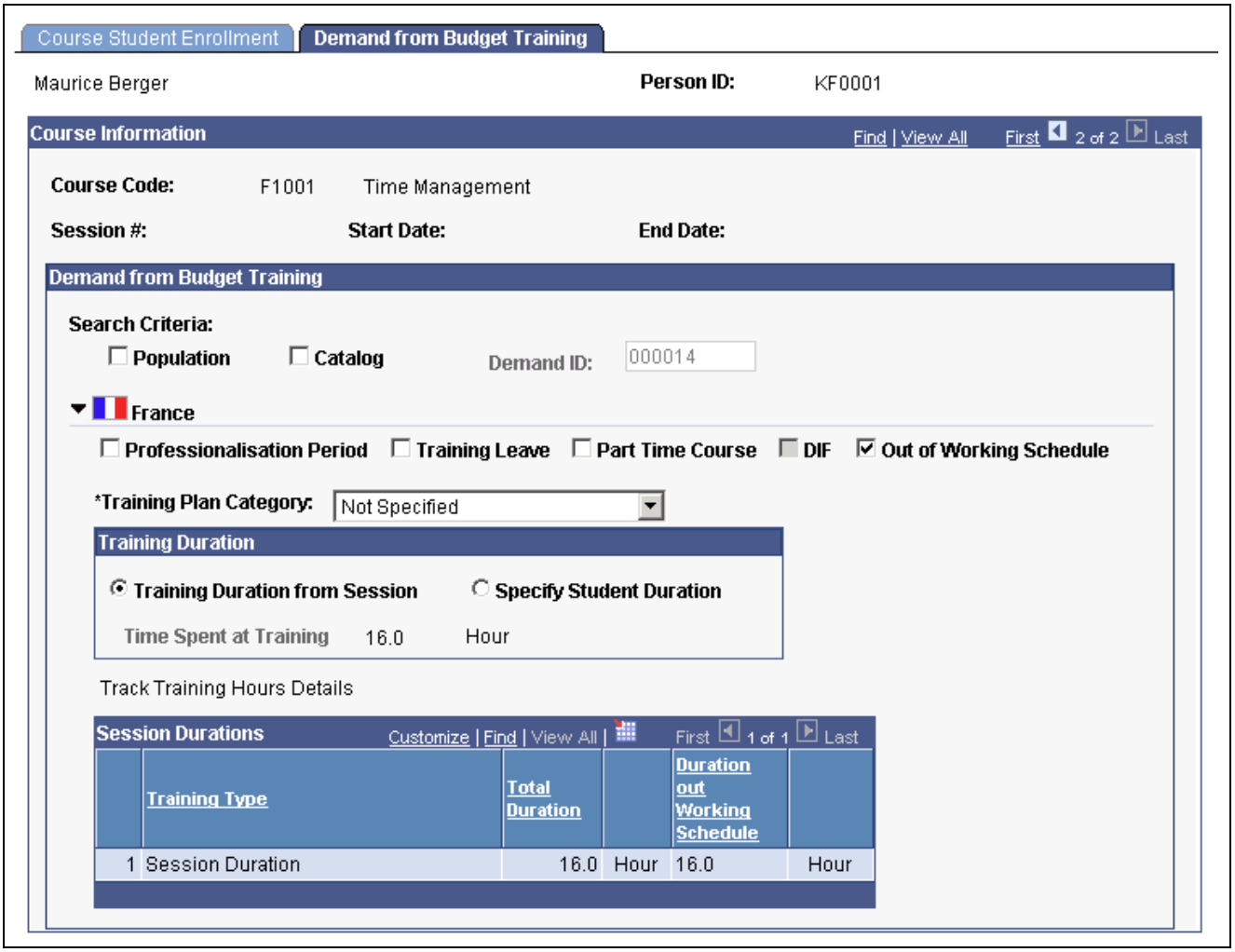
From Date and **To Date** — Enter start and end dates of study periods associated with this course.

Study hrs/wk (study hours per week) — Enter number of study hours per week associated with this course.

Travel hrs/wk (travel hours per week) — Enter number of travel hours per week associated with this course.

Linking a Student's Course Information to a Demand ID

Access the Demand from Budget Training page.



Demand from Budget Training page

On this page, you link enrollments with a training demand that you defined for budgeting purposes. This enables the system to compute the ratio of planned training costs to actual costs.

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Search Criteria

To locate the right demand ID, use the Population and Catalog check boxes or both to filter the demands.

Population Click to filter demands based on the employee's department, job code, and competencies.

Catalog Click to filter demands based on the course code.

Demand ID Select the demand ID. The Population and Catalog check boxes determine the list of demands from which you can select.

(FRA) France

The fields in this section apply to 2483 reporting for France.

Professionalization Period Select if course enrollment occurs as part of a professionalization contract.

DIF Select the DIF check box to activate the DIF fields on the Training Hours Details secondary page.

When this check box is selected, the system sets the Session Cut DIF Duration on the secondary page to the Session Cut Duration for all session cuts that have a status of *Awaiting Review*. When the check box is cleared, the DIF related rows are hidden on the secondary page and all DIF values are set to zero.

Out of Working Schedule Select to track enrollments out of the working schedule that trigger training allocation payments from the payroll system.

There are two allocations for training out of the working schedule: one is for DIF training, and the other is for skills development training.

When this check box is selected, the Duration out of Working Schedule field on the Training Hours Details page is set to the Session Cut Duration for all session cuts that have a status of *Awaiting Review*.

Note. If you select Out of Working Schedule but do not select DIF, you must set the Training Plan Category to *Skills Development* to enable allocations from the payroll system.

Note. The system automatically prevents you from changing the DIF and Out of Working Schedule options when all session cuts in a training session have a status other than *Awaiting Review*.

Track Training Hours Details Click the link to access the Training Hours Details page. On this page, enter DIF and Non-DIF hours for training sessions as well as session segments or "cuts."

Training Duration

Use the fields in this group box to specify the source of training duration data.

Training Duration from Session When Training Duration from Session is selected, the time spent at training is equal to the session duration entered on the Course Session Profile page of the Course Sessions component (COURSE_SESSN_TBL1).

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Specify Student Duration When Specify Student Duration is selected, you must enter the training duration in the Session Cut Duration (total duration) field on the Training Hours Details secondary page.

Note. You cannot change the Training Duration radio button options when all session cuts in a training session have a status other than *Awaiting Review*.

Session Durations

This group box displays summary information from the Session Cut Duration group box on the Training Hours Details page.

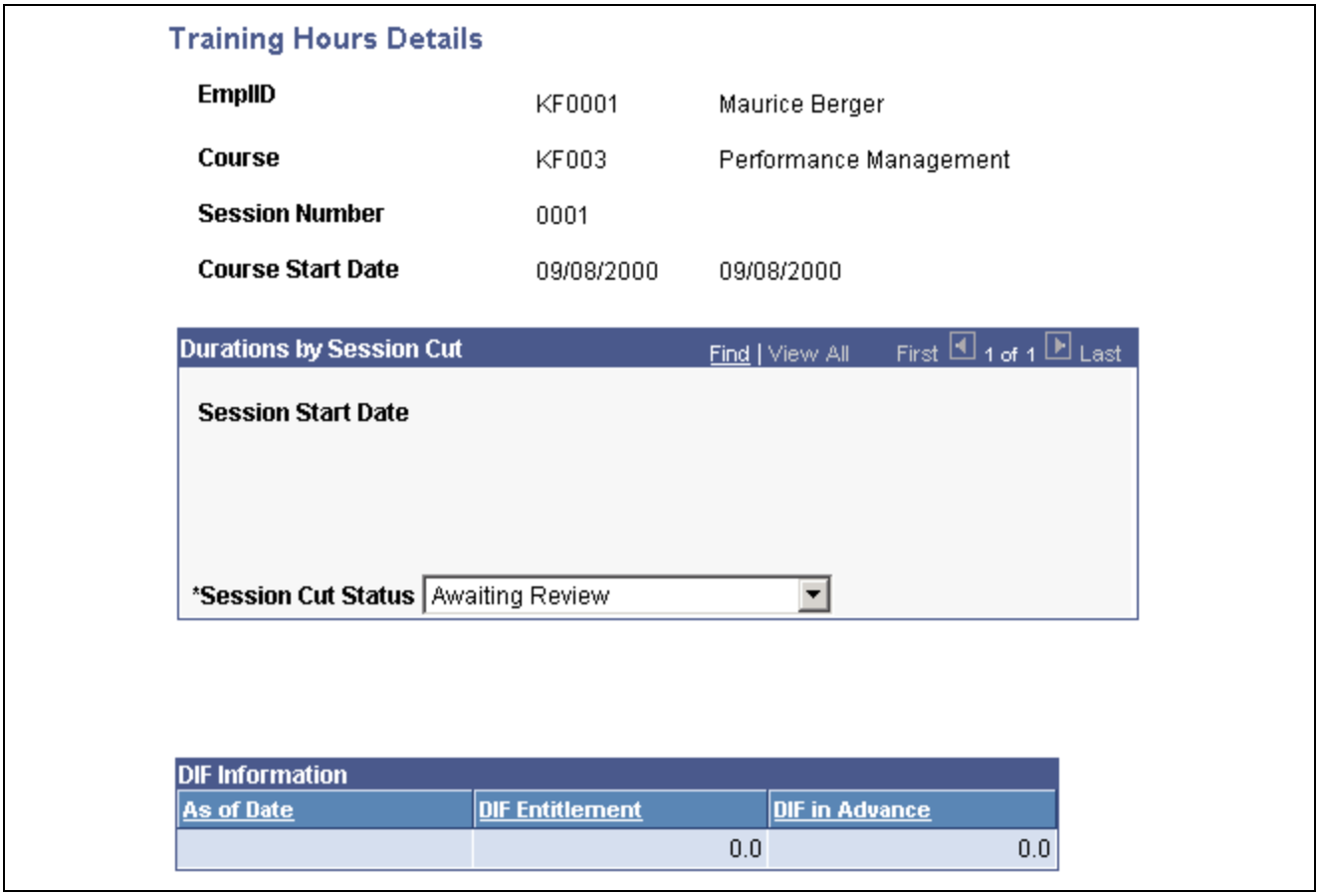
Note. The information in this group box is updated when you click the Refresh button on the Training Hours Details page.

See Also

Chapter 4, "Defining Training Requirements," Understanding Training Demand, page 61

Entering Training Hours Details

Access the Training Hours Details page.



Training Hours Details page

Because the DIF entitlement is updated monthly by a payroll calculation and a session can extend over multiple months, you must track the DIF hours for each session cut on the Training Hours Details page.

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Session Cut Start/End Dates

The dates displayed here are the dates specified on the Location, Instructor page (Enterprise Learning, Define Course/Cost Details, Course Sessions).

By default, a session contains at least one session cut with the same begin and end dates as the overall session period. However, when there are multiple session cuts in a session, each session cut must be defined with its own begin and end dates included in the overall session period.

Note. Define the dates of the entire session period on the Course Session Profile page (Enterprise Learning, Define Course/Cost Details, Course Sessions)

Session Cut Durations

Use the fields in this group box to enter the session cut duration, the duration out of the working schedule, the total DIF duration, and the DIF duration out of the working schedule.

Session Cut Duration

The Session Cut Duration field in the Total Duration column becomes available for data entry when you select the Specify Student Duration radio button on the Demand from Budget Training page. Otherwise, this field is display-only and shows the duration specified for the session cut on the Location, Instructor page.

By default, the Duration out of Working Schedule column is hidden. When the Out of Working Schedule check box is selected on the Demand From Budget Training page, the Duration out of Working Schedule column appears and is automatically populated with the session cut duration. You can change this duration if needed.

Note. The value entered in this field is valid if the Session Cut Duration >= Duration out of Working Schedule >= 0.

Session Cut DIF Duration

This row becomes available for data entry when you select the DIF check box on the Demand From Budget Training page.

Use the Session Cut DIF Duration field to enter the number of hours dedicated to DIF both in and out of the working schedule in relation to the Session Cut Duration. Note that the Out of Working Schedule column is visible only when the Out of Working Schedule check box is selected on the Demand From Budget Training page. By default, the Session Cut DIF Duration is equal to the Session Cut Duration.

Note. The Session Cut DIF Duration is valid if the Session Cut Duration >= Session Cut DIF Duration >= 0. The second column is valid if the Session Cut DIF Duration >= Session Cut DIF Duration out of Working schedule >= 0.

Session Cut Non-DIF Duration

This row appears when you select the DIF check box on the Demand From Budget Training page and is display-only. The system calculates the Session Cut Non-DIF Duration as the difference between the two previous rows (Session Cut Non-DIF Duration = Session Cut Duration - Session Cut DIF Duration). The system calculates the Duration Out of Working Schedule in the same way.

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Note. Click the Refresh button at the bottom of the page to calculate or update the values displayed in this field.

Session Cut Status Valid values are:

- *Awaiting Review:* Indicates that the training durations have been specified or have to be specified. The user can change all values on the page when the status is *Awaiting Review* (all fields are enabled).
- *Appr by Training Administrator:* Indicates that the training durations have been validated by the Training Administrator and cannot be changed for the session cut. When the status is *Appr by Training Administrator*, all fields are disabled except theSession Cut Status field. If the training administrator wants to change any values, he/she needs to reset the status to *Awaiting Review.*
- *Appr by Payroll Administrator*: Indicates that the training durations have been approved by the payroll administrator. When this status is set, all fields are disabled, including the Session Cut Status field (the training administrator cannot change any values on the page).
- *Finalized*: Indicates that the training information has been processed and that the administrator no longer needs to manage the information. When the status is Finalized, all fields on the page are disabled, including the Session Cut Status field (the Training Administrator cannot change any values).

Note. To make a course eligible for DIF funding, you must select the Eligible for DIF check box on the Course Profile page (Enterprise Learning, Define Course/Cost Details, Courses, Course Profile).

Session Durations

This group box contains a summary of information from the Session Cut Duration group box for all session cuts.

DIF Information

This group box displays DIF entitlement information imported from the payroll system.

As of Date Use this field to view past DIF entitlements. To do this, enter an as of date and click the Refresh button. The default value is the date of the latest computed entitlement.

DIF Entitlement This field displays the number of hours available for DIF training. This information is imported from the payroll system using the writable array FOR WA DIF HR.

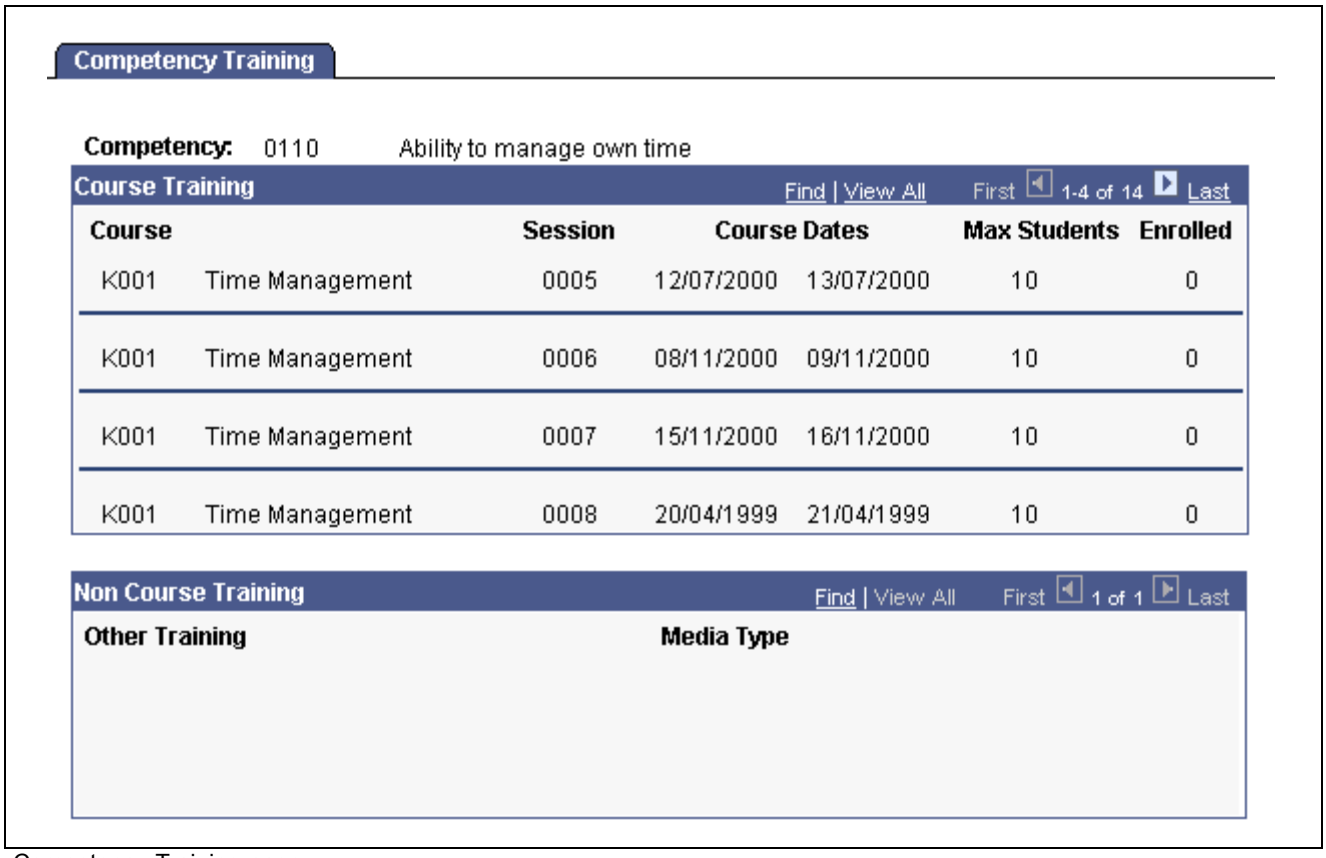
DIF in advance This field displays the amount of DIF in advance. This information is imported from the payroll system using the writable array FOR WA DIF HR.

Note. Click the Refresh button to update the automatically calculated values on the page.

Searching for Competency Training

Access the Competency Training page.

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Competency Training page

This page lists courses that are designated for the competency that you select.

(USF) Tracking Federal Training Requests

When you request training, you assign a status to the request, and the system routes it to authorizing and approving officials according to the agency's requirements. After reviews and approvals, the system enrolls or wait-lists the students.

The following pages are used for training tasks:

- To request training, use the Student Enrollment - Course Session Enrollment page.
- To directly enroll or wait-list students in training course sessions, and to enter students' grades for completed sessions, use the Course Wait List page or the Student Enrollment - Course Session Enrollment page.
- To review and print an employee's training request information, use the Student Enrollment - Course Session Enrollment page or the Student Training Summary page.

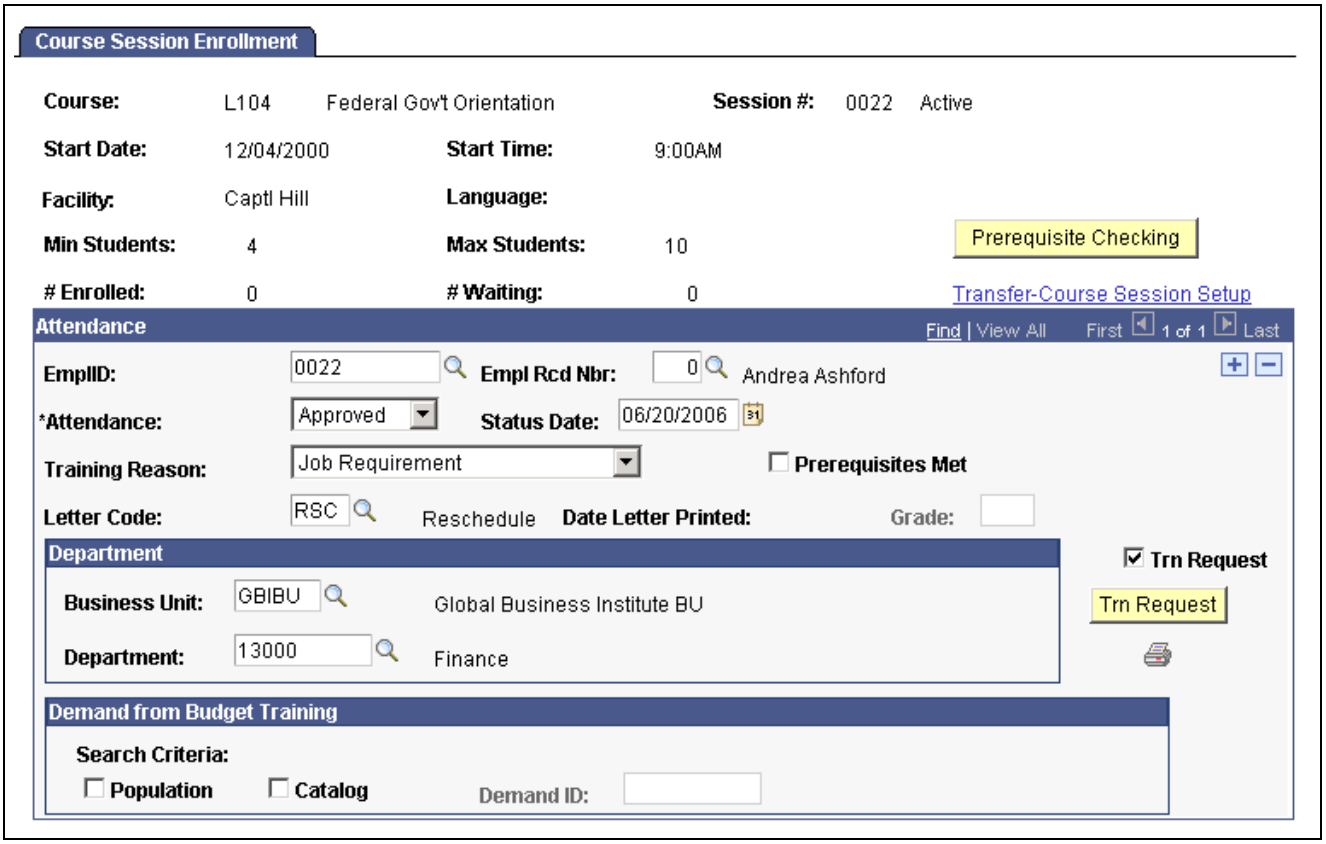
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Page Used to Track Training Requests

Page Name	Object Name	Navigation	Usage
Course Session Enrollment	COURSE_ENROLLMENT	Enterprise Learning, Student Enrollment, Enroll Individually, Course Session Enrollment	Track and review the courses that an individual student has requested and print the Training Request Form (SF182).

Tracking and Reviewing Requested Courses

Access the Course Session Enrollment page.



Course Session Enrollment page

Course, Session #, (session number) and **Attendance**

To add a course, insert a row and select the course, session number, and attendance status.

Trn Request

Click this button to view the USF - Employee Training Request page and enter or view training request information.

Click to print the Training Request Form (SF-182). The form is printed after you have completed and saved training request information.

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Reviewing Training-Related Employee Data

As you administer training programs, you can review and update other employee training-related information, such as education, competencies and languages, and the results of tests. This information is stored in employees' personal profiles that are set up and maintained using the Manage Profiles business process

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Managing Profiles"

Running Student Training Reports

This section discusses how to generate reports of employee training records.

Pages Used to Run Student Training Reports

Page Name	Object Name	Navigation	Usage
Student Training History	RUNCTL_TRN020	Enterprise Learning, Training Reports, Student Training History	Lists the courses and sessions completed by a student. This is a Crystal report.
Course Attend. School Program (course attendance school program)	RUNCTL_TRN021	Enterprise Learning, Training Reports, Training Programs, Course Attend. School Program	Lists the training program for an employee. This is an SQR report.

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CHAPTER 9

Tracking Training Costs

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

- Define and track reimbursable tuition expenses.
- Calculate and track student costs.
- Update actual training costs.
- Review training costs.
- (FRA) Review employee session costs.

Understanding Training Cost Tracking

This section lists common elements and discusses student reimbursement processing.

Common Elements Used in This Chapter

Data Override and **Override**

Select to manually change costs that are associated with a student for a specific course session. Cost fields become available. Selecting Data Override prevents the Compute Student Costs process (TRN013) to override costs entered by you.

Note. Once you change the default values on a page, you cannot select the Data Override check box again.

Warning! When you rerun the Compute Student Cost process (RUNCTL_TRN013) with this check box selected, the system overwrites the data on that page with new calculation results.

EE Qty (employee quantity)

Defines the number of units of equipment or materials. Can also define the number of units of the Expense Type value on the page that the employee used as part of the course session.

Per Employee Cost

Displays the costs per employee. The appropriate currency is defined in the field next to this field. You can override the costs by selecting the Data Override check box.

(FRA) Financed Cost, Financing Fund, and **Financing Department**

Use these fields to define the additional facility information that is used to generate the French Training Report 2483. Enter the financed cost if the student's training is financed by an external organization.

Select the financing fund that is used to finance the student's training costs. Set up financing funds in the Vendor table.

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Select the department that is financing the student's training costs.

Student Reimbursement Processing

You can use Human Resources to handle student reimbursements for external course expenses. The system calculates reimbursable amounts according to the schedules that you create. In the Budget Training business process, the system updates training costs as students complete courses and are reimbursed for training expenses and posts those costs against your organization's training budget.

Defining and Tracking Reimbursable Tuition Expenses

This section discusses how to:

- Define reimbursable expenses and percentages.
- Track student reimbursements.

Note. The reimbursement information that you track here is for informational purposes only and does not affect payroll processing in Human Resources Management (HRMS).

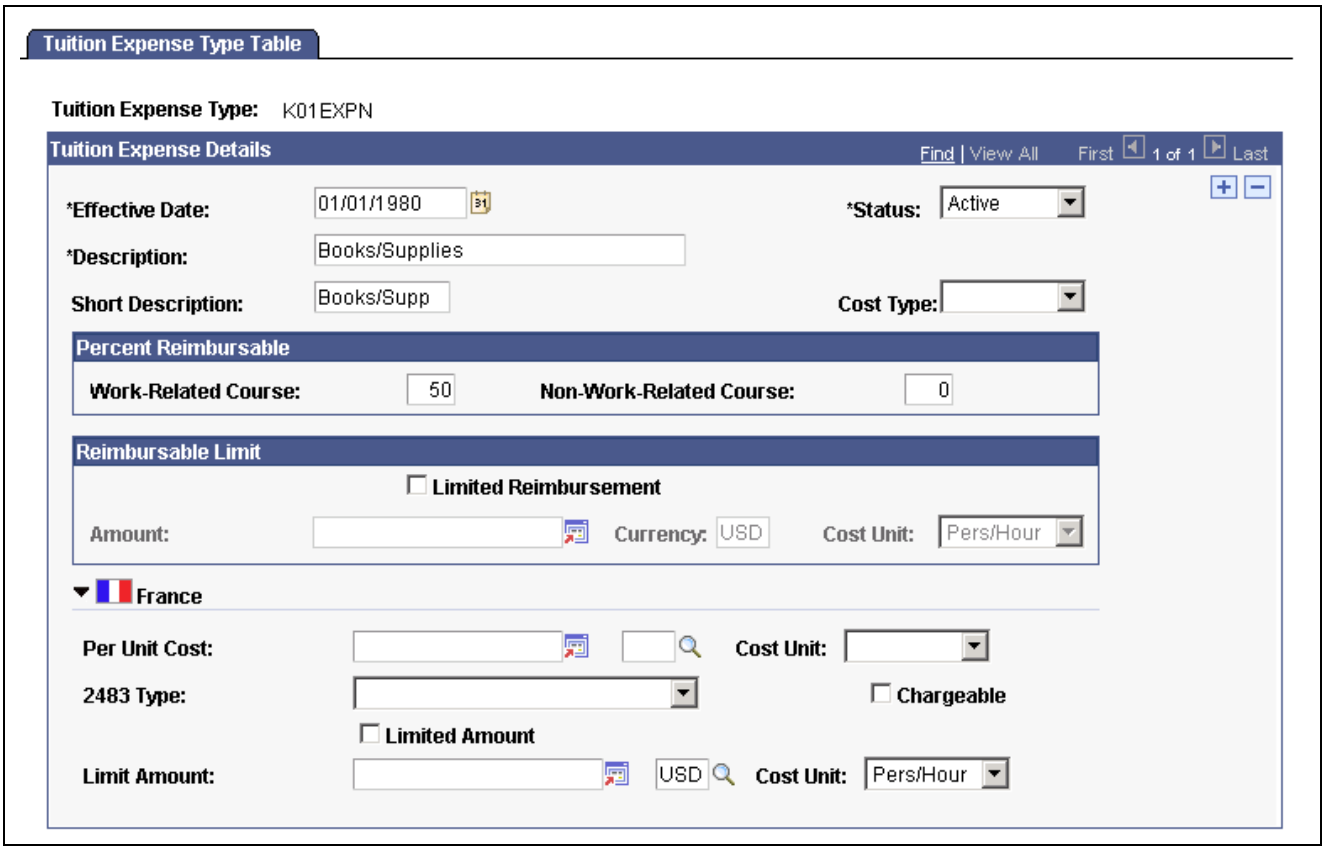
Pages Used to Define and Track Reimbursable Expenses

Page Name	Object Name	Navigation	Usage
Tuition Expense Type Table	TRN_EXPNS_TYP_GBL	Set Up HRMS, Product Related, Enterprise Learning, Tuition Expense Type, Tuition Expense Type Table	Define the types of training expenses that are reimbursable, define the percentage that is reimbursable, and set up a reimbursable limit.
Tuition Reimbursement	TRN_TUITION_REIMB	Enterprise Learning, Cost Analysis, Maintain Tuition Reimbursement, Tuition Reimbursement	Track reimbursable expenses.

Defining Reimbursable Expenses and Percentages

Access the Tuition Expense Type Table page.

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Tuition Expense Type Table page

Cost Type Select *Direct* or *Indirect.*

Percent Reimbursable

Work Related Course and **Non-Work-Related Course** Enter the percentage of the expense that is reimbursable. You can have different percentages for work-related and non-work-related courses.

Reimbursable Limit

Define reimbursable limits to help track tuition reimbursement costs.

Limited Reimbursement Select to limit the amount that the students are reimbursed. The system makes the Amount and Cost Unit fields available.

Amount and **Cost Unit** Enter the reimbursable limit and select the associated unit.

For example, you can specify a flat cost, such as 100 USD, or limit the amount that is reimbursed for a period, such as 100 USD, per person per year.

(FRA) France

Define additional expense data for 2483 report requirements.

2483 Type Select an expense type. Options are *Equipment, Furniture*, *Instructor Lodging & Transport, Instructor, Student Lodging & Transport, Non-Instructor* (non-instructor-related expenses), and *Student Restaurant.*

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Chargeable Select to make the training course a chargeable item for the 2483 report. When selected, related costs that you entered are reported in the 2483 report. This is used to meet French legal reporting requirements. The default value derives from the chargeable flag set in the Course setup page and by the Compute Student Cost process.

Limited Amount Select if the expense amount is restricted to a specific value. The system makes the Limit Amount and Cost Unit fields available. The limit amount is applied when computing the chargeable cost.

Limit Amount and **Cost Unit** Enter the limit amount and select the associated unit.

For example, to limit hotel lodging to FRF 2000 per person per day, enter *2000* in the Limit Amount field and select *Pers/Day* in the Cost Unit field .

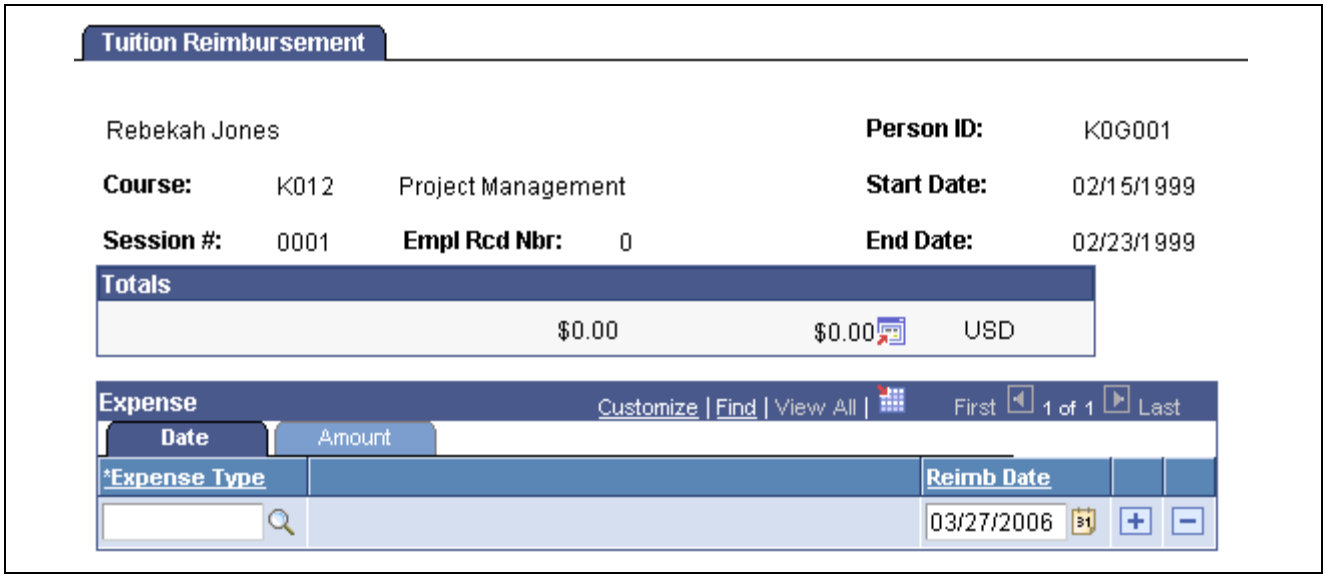
Note. The quantity also applies to the limit. For example 2 meals that are paid by the same student costs 20 EUR pers/day, qty = 2. If the charge is only 15 EUR pers/day, the limit will be 15*2 = 30 EUR pers/day.

See Also

Chapter 12, "(FRA) Producing the French Training Report 2483," page 221

Tracking Student Reimbursements

Access the Tuition Reimbursement page.



Tuition Reimbursement page

You can track all expense types for which you usually reimburse students, including tuition, textbooks, and ancillary materials.

You can enter and update tuition reimbursements only for courses where students have a status of *Enrolled, Currently Attending,* or *Completed.* You update (or the system updates) the student status on the Course Session Enrollment and Student Training pages.

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Totals

Displays the sum of the amounts in the Expense Amount field on the Date tab and the sum of the amounts in the Amount Reimbursed field and the currency code from the Amount tab.

Date Tab

Expense Type Select an expense type from the types that you created on the Tuition Expense Type Table page.

Amount Tab

Work RLTD (work-related) and **Amount Reimbursed** Select if the course is work-related.

The system calculates the amount that is to be reimbursed to the student based on the percentages that you entered on the Tuition Expense Type table. You can set up different percentages for work-related and non-work-related courses. If you have set a reimbursable limit on the Tuition Expense Type table, and you select this check box, the system calculates the amount that is to be reimbursed. If the limit is exceeded, the system displays a warning message and adjusts the Amount Reimbursed value. You can continue with the reduced amount or update the amount reimbursed.

See Also

Chapter 3, "Setting Up Training Costs," Selecting the Base Currency for Training Costs, page 42

Calculating and Maintaining Student Costs

To calculate student costs for a course session, run the Compute Student Costs process. This process splits out the training costs to the employee level using cost information that is specified at the course, course catalog, and course session levels.

The process calculates the training cost for each employee in the specified session, for the specified budget period, and populates the tables that store employee training cost component information as follows:

Cost Component	Table
Salary	TRN_EESAL_COST
Vendor	TRN_EEPROV_COST
Facility	TRN_EEFACIL_COST
Equipment	TRN_EEEQUIP_COST
Instructor	TRN_EEINST_COST

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Cost Component	Table
Employee Expense	TRN_EEEXPN_COST
Session Expense	TRN_SSEXPN_COST

Once you've run this process, you can view the results in the Track Student Cost component. Adjustments that you make to the cost information in that component override the cost information that is calculated by the process.

The Compute Student Costs process affects the 2483 Training Report as follows:

- Splits session costs and computes the company cost, the financed cost and the chargeable cost for each student.
- Updates the employee salary costs.
- Determines if the cost is chargeable and sets the chargeable flag in the Maintain Student Costs page.
- Imports external expenses.

This section discusses how to:

- Run the Compute Student Costs process.
- (FRA) Review and update vendor costs.
- (FRA) Update and maintain facility costs.
- (FRA) Update and maintain equipment costs.

Pages Used to Calculate and Track Student Costs

Page Name	Object Name	Navigation	Usage
Compute Student Cost	RUNCTL_TRN013	Enterprise Learning, Cost Analysis, Calculate Student Cost, Compute Student Cost	Run the Compute Student Costs process before you review or update actual training costs at the employee level. This process computes student costs by budget period for the course sessions that you specify as part of the process parameters.
Maintain Student Costs - Salary	TRN_EE_SESSN_CST1	Enterprise Learning, Cost Analysis, Maintain Student Costs, Salary	Review the employee salary costs that are associated with a course session and budget period.
Maintain Student Costs - Vendor	TRN_EE_SESSN_CST3	Enterprise Learning, Cost Analysis, Maintain Student Costs, Vendor	Review and update the vendor costs resulting from the Compute Student Costs process.

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Page Name	Object Name	Navigation	Usage
Maintain Student Costs - Facility	TRN_EE_SESSN_CST5	Enterprise Learning, Cost Analysis, Maintain Student Costs, Facility	Review and update the facility costs resulting from the Compute Student Cost process.
Maintain Student Costs - Equipment	TRN_EE_SESSN_CST7	Enterprise Learning, Cost Analysis, Maintain Student Costs, Equipment	Review and update training equipment and materials costs resulting from the Compute Student Cost process.
Maintain Student Costs - Instructor	TRN_EE_SESSN_CST4	Enterprise Learning, Cost Analysis, Maintain Student Costs, Instructor	Review and update the training instructor costs resulting from the Compute Student Cost process.
Track Student Costs - Employee Expense	TRN_EE_SESSN_CST2	Enterprise Learning, Cost Analysis, Maintain Student Costs, Employee Expense	Update the employee expense costs resulting from the Compute Student Costs process.
Maintain Student Costs - Session Expense	TRN_EE_SESSN_CST6	Enterprise Learning, Cost Analysis, Maintain Student Costs, Session Expense	Update the expense costs resulting from the Compute Student Cost process.

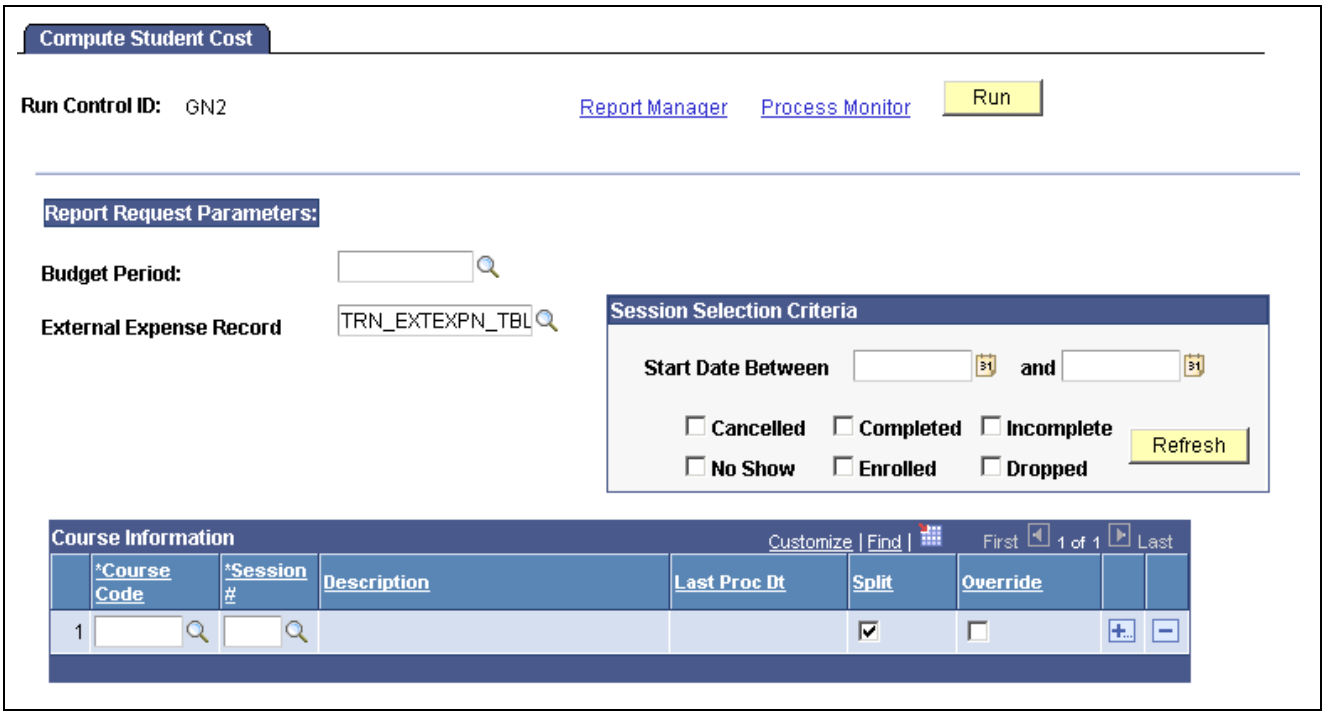
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Page Name	Object Name	Navigation	Usage
EE Sessn Cost Summary (employee session cost summary)	RUNCTL_TRN032	Enterprise Learning, Training Reports, EE Session Cost Summary, EE Sessn Cost Summary	Run the EE Sessn Cost Summary report (TRN032). This report lists the costs that are associated with an employee who is attending a course. Costs are for salary, vendor, facility, equipment, instructor, employee expense, and session expense. This is an SQR report. **Note.** You must run the Compute Student Cost process before you run this report. The EE Session Cost Summary job runs two processes to produce the report: • EE Session Costs (HR_TRNEECOST). This is an application engine process that extracts the costs and stores them in a temporary table (PS_TRN032_TAO). The system runs this process first to generate the data for the report. • EE Session Cost Summary. This is an SQR process that generates the report using the data in the temporary table.

Running the Compute Student Costs Process

Access the Compute Student Cost page.

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Compute Student Cost page

From Date and **Thru Date** (through date) When you select a budget period, the from and through dates are populated with values from the Budget Period Table page.

External Expense Record Students' travel and lodging expenses.

Note. When training expenses are managed by another system other than PeopleSoft, it is possible to import costs from the external system via a table. The table that is used as the interface between Peoplesoft and the other system should be filled with costs to be imported. When running the process, costs specified into this interface table are imported into TRN_EEEXPN_COST .

Session Selection Criteria

Start Date Between...and Select the session start and end dates.

Refresh button Click to populate all the sessions with a similar session start date into the specified dates.

Cancelled, Completed, Incomplete, No Show, Enrolled, and **Dropped** Select to include students with each status for the selected course and session.

Course Information

Course Code The system displays courses that have completed sessions for the selected budget period only.

Session # (session number) Select from the list of completed sessions.

Last Proc Dt (last process date) Displays the date that you last ran the Compute Student Cost process for the specified course session and budget.

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Split Select to proceed with the process and populate the Track Student Cost pages with the process calculation results.

Override The process does not automatically alter costs entered manually into the Track Student Costs page (when the Data Override check box is selected on that page). To force the process to store computed costs into the Trainees Salary Costs page, select this check box.

See Also

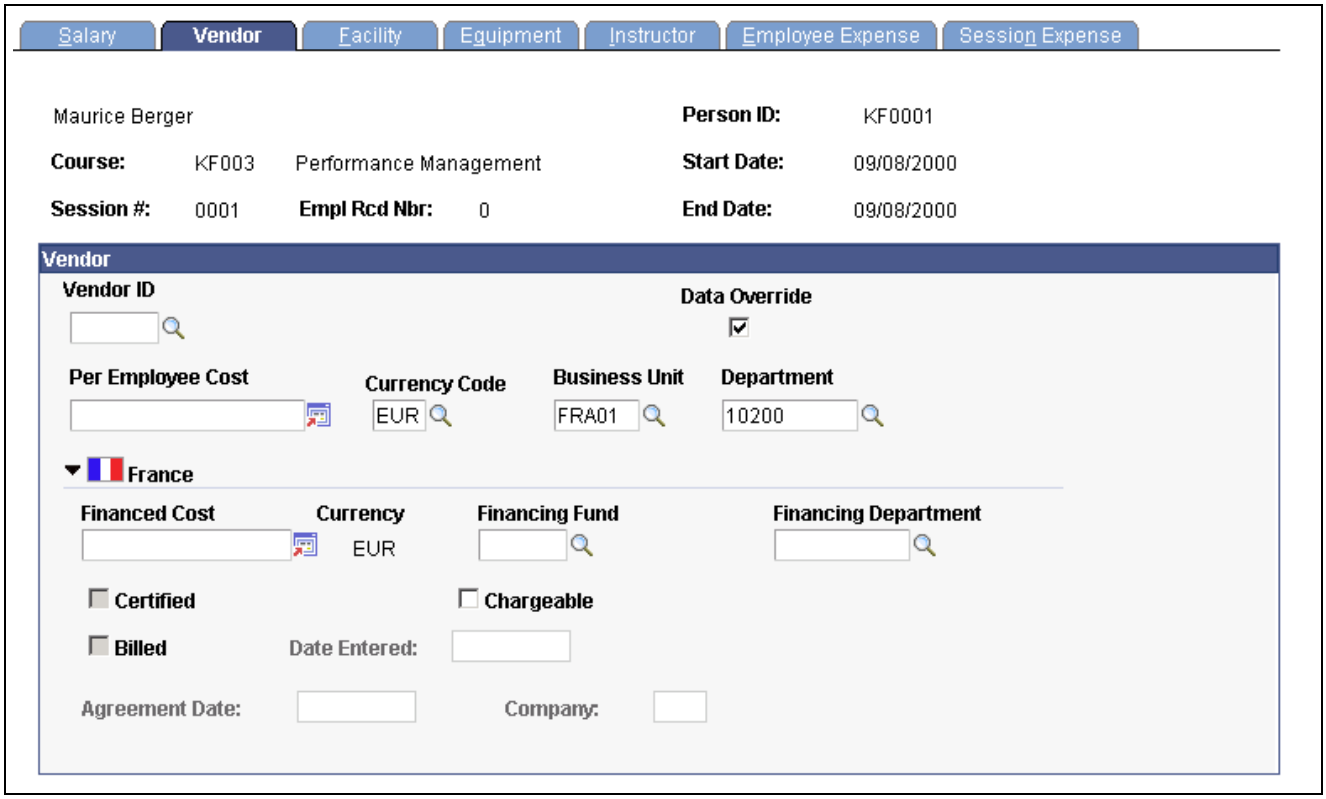
Chapter 4, "Defining Training Requirements," page 61

aelm, (FRA) Managing French Regulatory Requirements, Managing Learning Costs and 2483 Reporting, Understanding Cost Management.

PeopleTools PeopleBook: PeopleSoft Process Scheduler

(FRA) Reviewing and Updating Vendor Costs

Access the Maintain Student Costs - Vendor page.



Maintain Student Costs - Vendor page

Define additional vendor information to be tracked for legal reporting.

Certified, Billed, and **Chargeable** For legal reports, select any check box that is applicable.

Date Entered Enter date that the invoice was entered for the vendor.

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Note. The Date Entered field is activated when the Billed date is activated. This is 2483 specific. To be chargeable, a vendor should be certified, chargeable, have an invoice with the Billed date included within the declaring year and a valid agreement number should be specified if the Vendor Type is *Consulting Firm* or *Training Provider.*

Agreement Date and **Company** — Enter the agreement date and the name of the company that signed the agreement.

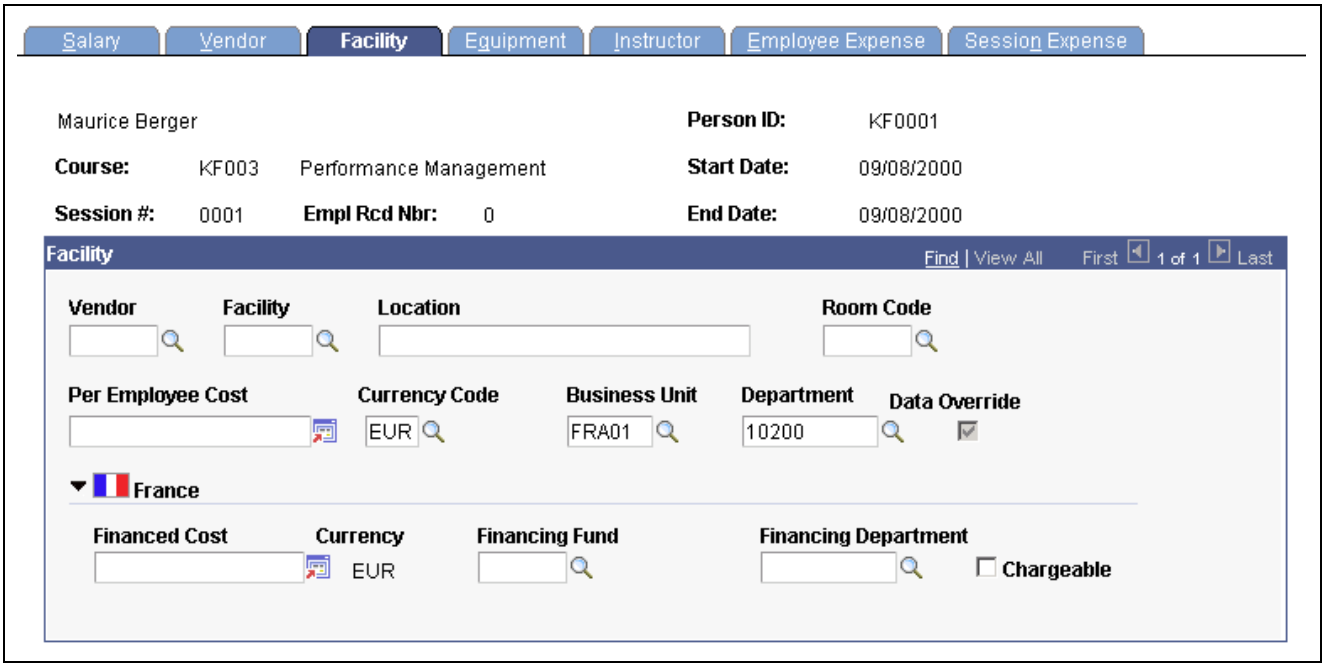
See Also

Chapter 3, "Setting Up Training Costs," Selecting the Base Currency for Training Costs, page 42

Chapter 12, "(FRA) Producing the French Training Report 2483," page 221

(FRA) Updating and Maintaining Facility Costs

Access the Maintain Student Costs - Facility page.

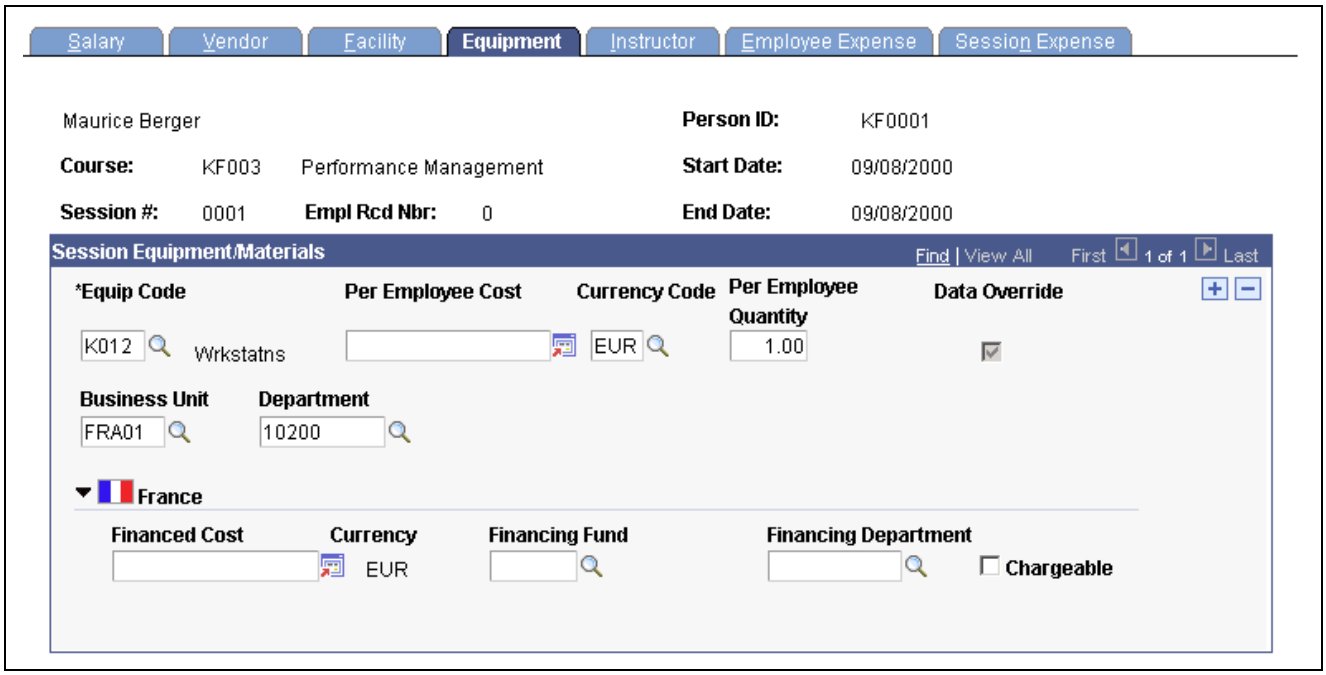


Maintain Student Costs - Facility page

(FRA) Updating and Maintaining Equipment Costs

Access the Maintain Student Costs - Equipment page.

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Maintain Student Costs - Equipment page

(FRA) Updating Training Cost Data Imported from Enterprise Learning Management

When training costs are deleted or cost types changed in Enterprise Learning Management for data already imported into Administer Training, the original imported data is not automatically deleted from Administer Training and must be deleted manually.

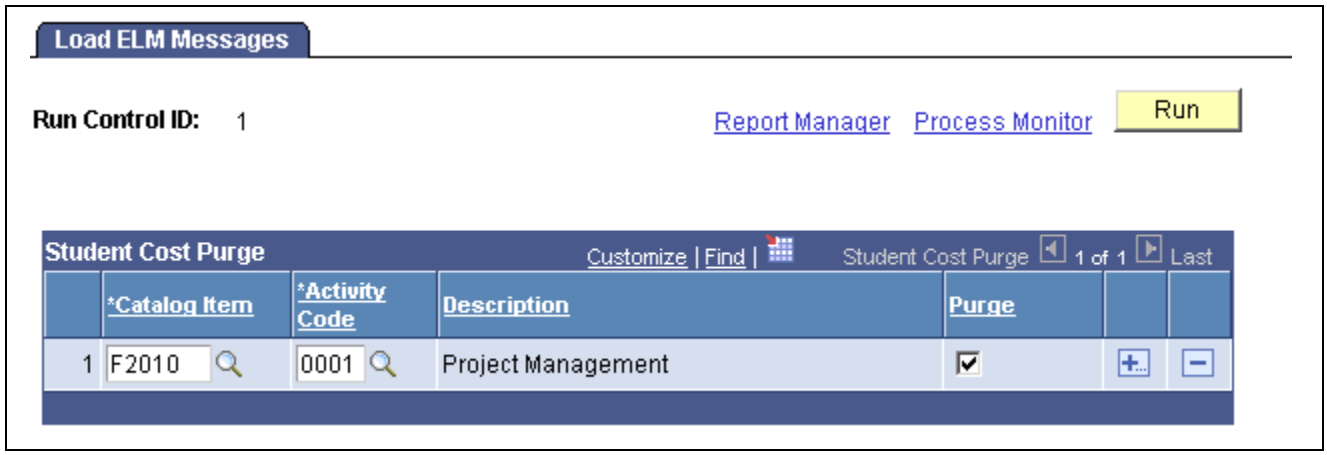
Page Used to Purge Deleted ELM Cost Data

Page Name	Object Name	Navigation	Usage
Load ELM Messages	TRN_ELM_LOAD_MSG	Enterprise Learning, ELM Integration, Load ELM Messages, Load ELM Messages	Enter costs to be purged from Administer Training.

Purging Deleted ELM Cost Data

Access the Load ELM Messages page.

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Load ELM Messages page

Updating Actual Training Costs

The Update Planned and Real Costs process updates the actual training costs that you're tracking in the Administer Training business process. You can post these costs against the training budget in the Budget Training business process.

Once you run the Update Planned and Real Cost Process, you can examine how you've spent your training budget, using online inquiry pages that detail the budgeted costs for your organization and any unbudgeted costs that you incurred as part of training your employees. Also, you can look at how your organization's total budgeted costs compare to what you spent on training at the end of the budget period, or at any point along the way, to examine how the projected expenditures compare to what you've spent.

Note. Run this process only if you have set up a training budget using the Budget Training business process and have been tracking actual training costs in the Administer Training business process.

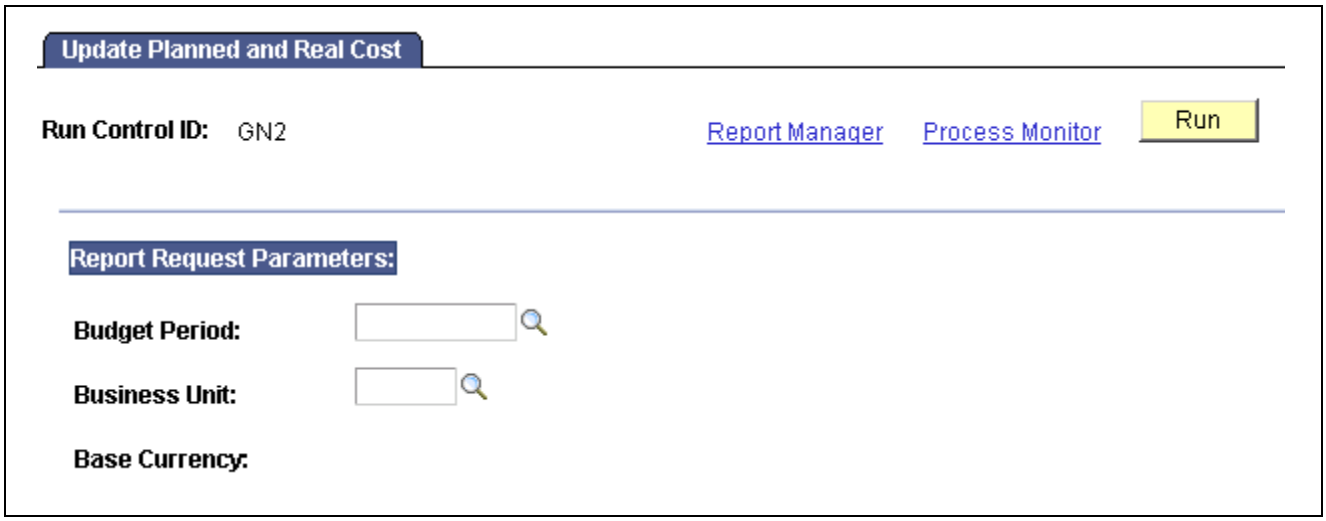
Page Used to Run the Update Planned and Real Cost Process

Page Name	Object Name	Navigation	Usage
Update Planned and Real Cost	RUNCTL_TRN012	Enterprise Learning, Cost Analysis, Calculate Planned/Real Costs, Update Planned and Real Cost	Run the Update Planned and Real Cost process.

Running the Update Planned and Real Cost Process

Access the Update Planned and Real Cost page.

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Update Planned and Real Cost page

Budget Period You can update costs for any predefined budget period, but you'll want to run the process only against the current budget period, because you need to have recorded actual training costs to obtain meaningful cost results. You can run the process anytime during the current budget period to see how projected training spending compares to actual expenditures.

Note. The budget period needs to be frozen for the process to execute properly.

Base Currency When you move out of the Business Unit field, the system displays the base currency for that business unit. When the system calculates the costs for this budget period and business unit, it converts the costs to the base currency shown here. Then you can compare training expenditures and budget amounts in the same currency.

When the system executes the Update Planned and Real Costs process, it calculates totals for all cost elements for each training demand that is associated with the selected budget period and business unit and compares the totals to the total training budget.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Chapter 5, "Planning Training Budgets," Creating Global Scenarios, page 95

Reviewing Training Costs

This section discusses how to:

- Review training costs.
- Review nonbudgeted training costs.
- Compare budgeted costs to actual costs.

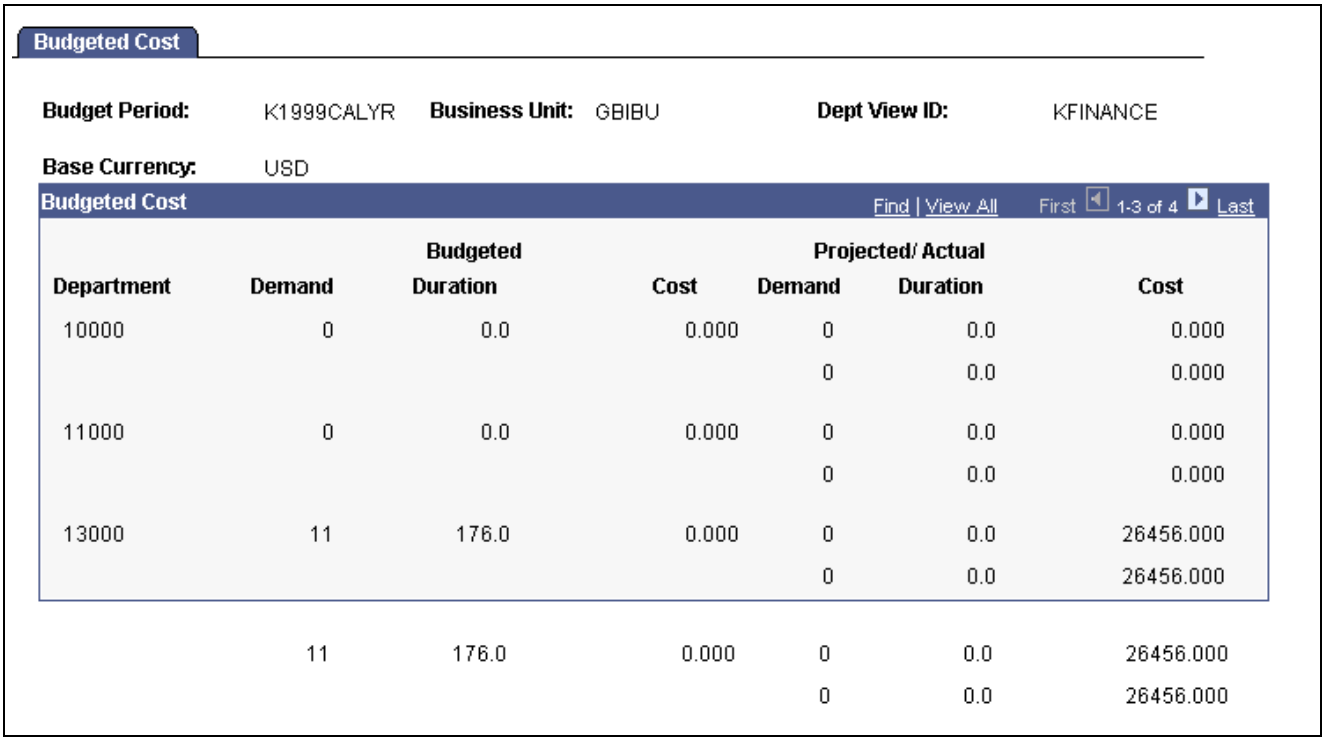
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Pages Used to Review Training Costs

Page Name	Object Name	Navigation	Usage
Budgeted Cost	TRN_BDGT_ACT_COST	Enterprise Learning, Cost Analysis, Review Costs, Budgeted, Budgeted Cost	Review budgeted costs compared to actual training costs.
Unbudgeted Cost	TRN_NOTBDGT_COST	Enterprise Learning, Cost Analysis, Review Costs, Unbudgeted, Unbudgeted Cost	Review current unbudgeted training costs. Costs can include projected costs without any actual expenditure, if you have not spent the projected amount.
Summary Cost	TRN_CMPSUMMRY_COST	Enterprise Learning, Cost Analysis, Review Costs, Summary, Summary Cost	Compare budgeted and actual training cost totals.

Reviewing Budgeted Costs

Access the Budgeted Cost page.



Budgeted Cost

Budget Period: K1999CALYR **Business Unit:** GBIBU **Dept View ID:** KFINANCE

Base Currency: USD

Budgeted Cost Find | View All First 1-3 of 4 Last

Department	Budgeted Demand	Budgeted Duration	Budgeted Cost	Projected/ Actual Demand	Projected/ Actual Duration	Projected/ Actual Cost
10000	0	0.0	0.000	0	0.0	0.000
				0	0.0	0.000
11000	0	0.0	0.000	0	0.0	0.000
				0	0.0	0.000
13000	11	176.0	0.000	0	0.0	26456.000
				0	0.0	26456.000
	11	176.0	0.000	0	0.0	26456.000
				0	0.0	26456.000

Budgeted Cost page

Note. In the departmental view, to see all the budgeted training versus the current training information for all departments, you may need to scroll down the page.

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See Also

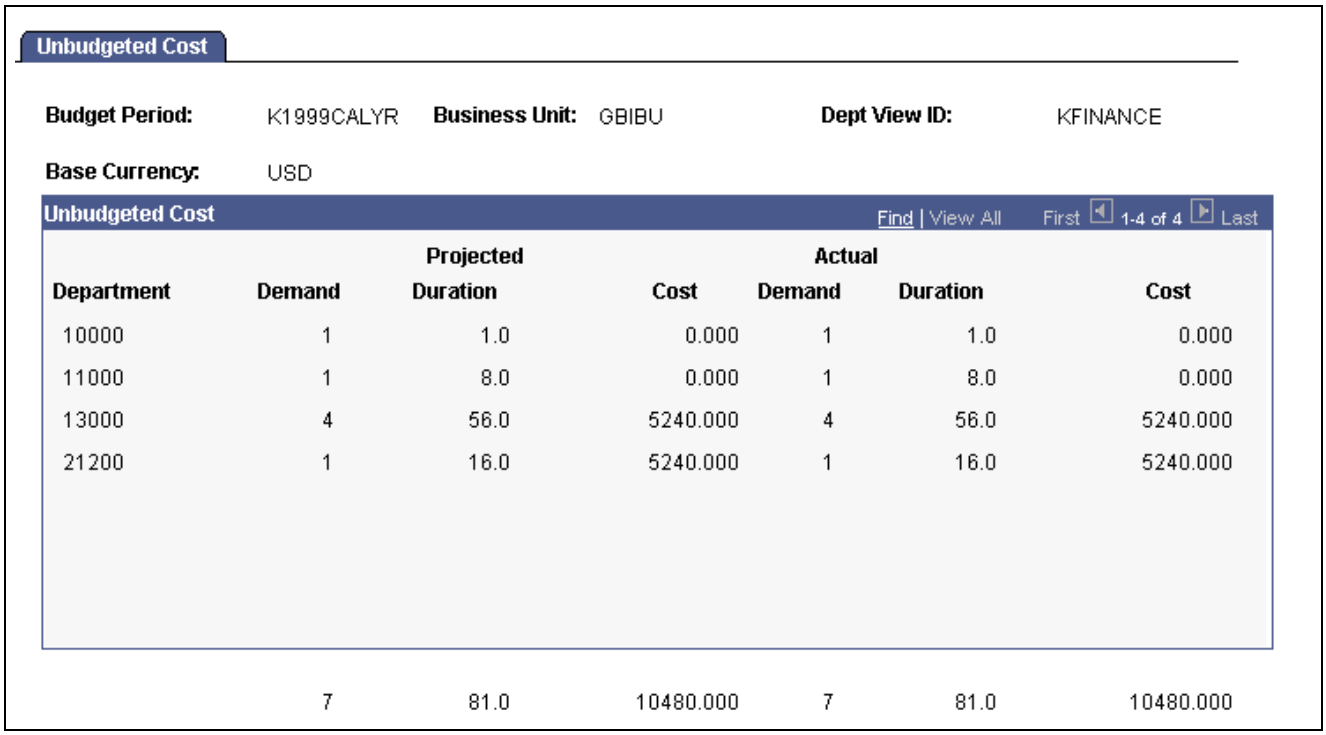
Chapter 5, “Planning Training Budgets,” Tracking Training Plans, page 104

Chapter 3, “Setting Up Training Costs,” Defining Default Training Costs, page 46

Chapter 3, “Setting Up Training Costs,” Selecting the Base Currency for Training Costs, page 42

Reviewing Unbudgeted Costs

Access the Unbudgeted Cost page.

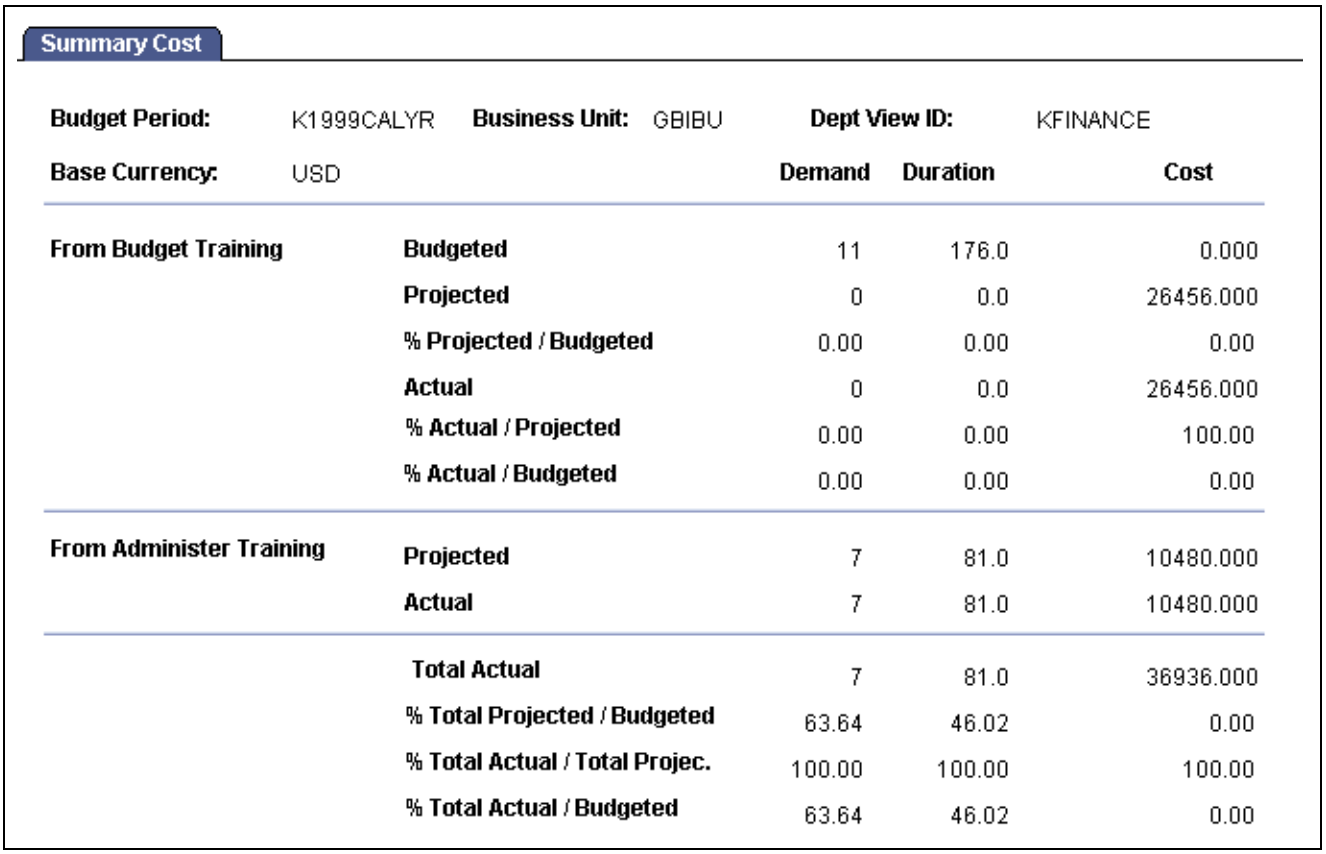


Unbudgeted Cost page

Comparing Budgeted Costs to Actual Costs

Access the Summary Cost page.

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Summary Cost

Budget Period:	K1999CALYR	**Business Unit:** GBIBU	**Dept View ID:**	KFINANCE
Base Currency:	USD			

		Demand	Duration	Cost
From Budget Training	**Budgeted**	11	176.0	0.000
	Projected	0	0.0	26456.000
	% Projected / Budgeted	0.00	0.00	0.00
	Actual	0	0.0	26456.000
	% Actual / Projected	0.00	0.00	100.00
	% Actual / Budgeted	0.00	0.00	0.00
From Administer Training	**Projected**	7	81.0	10480.000
	Actual	7	81.0	10480.000
	Total Actual	7	81.0	36936.000
	% Total Projected / Budgeted	63.64	46.02	0.00
	% Total Actual / Total Projec.	100.00	100.00	100.00
	% Total Actual / Budgeted	63.64	46.02	0.00

Summary Cost page

From Budget Training

These results include all the demands that you budgeted for in the Budget Training business process.

For all of the budgeted training costs for the specified budget period, business unit, and departments in the departmental view ID), the system provides demand, duration and cost information as follows:

Category	Demand	Duration	Cost
Budgeted	Budgeted total demand (number of employees to be trained).	Budgeted total training duration that you estimated as part of the training budget.	Total budgeted training cost.
Projected	Projected (current realized) training demand (number of employees that are enrolled or are in training).	Projected (current realized) duration for the training that has occurred to date.	Projected cost for the training to date. The projected amounts here include those students that have been enrolled in the course sessions for that budget period, including those who have completed the course.

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Category	Demand	Duration	Cost
Percent of projected (realized) cost compared to budgeted cost	Projected (realized) demand compared to budgeted demand.	Projected (realized) duration compared to budgeted duration	Projected cost compared to budgeted cost. This represents the budget percentage you've projected that you will spend to date. Remember that you haven't actually spent this money yet, because it is only projected.
Actual training expenses incurred to date	Actual number of employees trained (demand).	Actual total training duration to date.	Actual cost to date.
Percentage of actual costs compared to projected costs	Actual number of employees trained compared to projected number of employees trained.	Actual duration amount compared to projected training duration amount.	Actual training cost compared to projected training cost. If the amount is 100 percent, then the projected budget amount equals the actual amount that you've spent. If the result is less than 100 percent, you still have projected budget money to spend. If the amount is more than 100 percent, then you've overspent the training budget.
Percentage of actual cost compared to budgeted cost	Actual (realized) demand compared to budgeted demand.	Actual (realized) duration compared to budgeted duration.	Actual (realized) cost compared to budgeted cost. This represents the percentage of the budget that you've spent to date.

From Administer Training

These amounts are for costs that were not included as part of the training budget for the budget period. This includes all training that was tracked in the Administer Training business process but not linked to a budget training demand, as follows:

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Category	Demand	Duration	Cost
Projected	Projected (current realized) training demand (number of employees that are enrolled or are in training).	Projected (current realized) duration for the training that has occurred to date.	Projected cost for the training to date. The projected amounts here include those students that have been enrolled in the course sessions for that budget period, including those that have completed the course.
Actual	Actual unbudgeted employees trained.	Actual unbudgeted training duration amount.	Actual cost associated with training unbudgeted employees. The actual population is made up of students that have completed the course sessions for that budget period (Attendance status is *Completed*).

Total Actual Costs

These amounts represent a summary of the actual costs, both as part of the training budget and from unbudgeted costs that are tracked in the Administer Training business process, as follows:

Category	Demand	Duration	Cost
Total actual	Total (current realized) training demand (number of employees currently trained or in training.	Total (current realized) duration for the training that has occurred to date.	Total cost for the training to date.
Percentage of total budgeted amount that the projected amount represents	Percentage of total budgeted demand the projected demand represents.	Percentage of total budgeted duration the projected duration represents.	Percentage of the total budgeted cost that the projected cost represents. The projected amounts here include students who have been enrolled in the course sessions for that budget period but have not yet completed the course (Attendance status is other than *Completed*).

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Category	Demand	Duration	Cost
Percentage of the total actual amount represented by the total projected amount	Percentage of the total actual demand represented by the total projected demand.	Percentage of the total actual duration represented by the total projected duration	Percentage of the total actual cost represented by the total projected cost. The projected amounts here include those students that have been enrolled in the course sessions for that budget period but have not yet completed the course (Attendance status is other than *Completed*).
Percentage of total budgeted amount that the actual amount represents	Percentage of total budgeted demand that the actual demand represents.	Percentage of total budgeted duration that the actual duration represents.	Percentage of the total budgeted cost that the actual cost represents.

(FRA) Reviewing Employee Session Costs

If you're administering training programs for French workers, you can view a summary of course session cost information for the employee. This inquiry page displays information that is relevant to the French Training Report 2483 and includes information about financed training costs and chargeable amounts that aren't included on the Student Training Summary page.

Use this inquiry page only after you've run the FRA Compute 2483 process and reviewed or updated the employee's cost information on the Track Student Cost component.

See Also

Chapter 12, "(FRA) Producing the French Training Report 2483," page 221

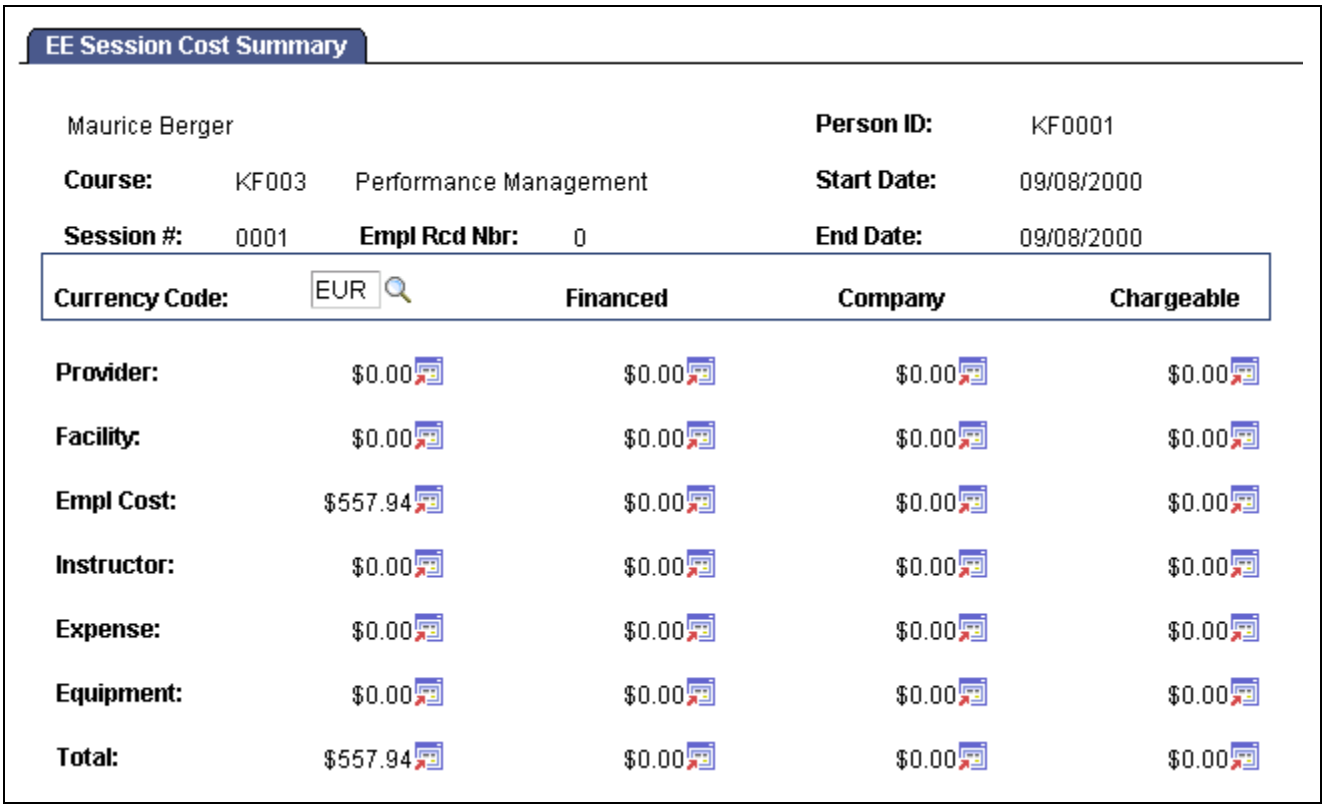
Page Used to Review Employee Session Costs

Page Name	Object Name	Navigation	Usage
EE Session Cost Summary (employee session cost summary)	TRN_EE_SMR_COST1	Enterprise Learning, Cost Analysis, Review Costs, Student Ssn Cost Summary FRA, EE Session Cost Summary	View a summary of course session cost information for an employee. **Note.** This page is relevant to French organizations only.

Viewing Employee Course Session Costs

Access the EE Session Cost Summary page.

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EE Session Cost Summary page

For each cost that is categorized as a provider, facility, employee cost, instructor, expense, or equipment amount in the France group boxes on the Track Student Cost page, the system displays that cost for the session indicated.

For each charge, the system displays:

- The total amount that is associated with the training category.
- The total financed amount for the training category.
- The total company-contributed amount for the training category.
- The total chargeable amount for the training category. Company costs are calculated as follows: Company Costs = Total Costs − Financed Costs

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Note. The chargeable amount is based on charges for French workers that you indicated as chargeable on the cost pages in the Administer Training business process. Chargeable costs are also reflected in the company-contributed or -financed amount, as indicated in the Course Session Cost table. You can indicate a cost as chargeable in the Course Session Cost French group boxes in Administer Training.

At the bottom of the page, the system displays the total cost for the course session for this student, the total financed amount, the total company-contributed amount, and the total chargeable amount.

See Also

Chapter 12, “(FRA) Producing the French Training Report 2483,” page 221

Chapter 3, “Setting Up Training Costs,” Selecting the Base Currency for Training Costs, page 42

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CHAPTER 10

(DEU) Tracking Professional Educational Programs for German Employees

This chapter provides an overview of German internal educational training programs and discusses how to set up training plans and track employee progress.

Understanding German Internal Educational Training Programs

Companies in Germany can have their employees follow company-provided professional educational training programs. Companies that offer these programs, called German internal education training programs, can track the steps and status of employees as they work toward their degrees.

To set up and monitor a German internal education training program:

1. Identify the steps that make up the education plan.
2. Group the steps to create a training plan.
3. Enroll an employee in a plan.
4. Enter information about the employee or track the employee's progress.

Setting Up Training Plans and Tracking Employee Progress

This section discusses how to:

- Identify the steps in a training program.
- Group the steps into a training plan.
- Enroll an employee in a plan.
- Track employee progress.

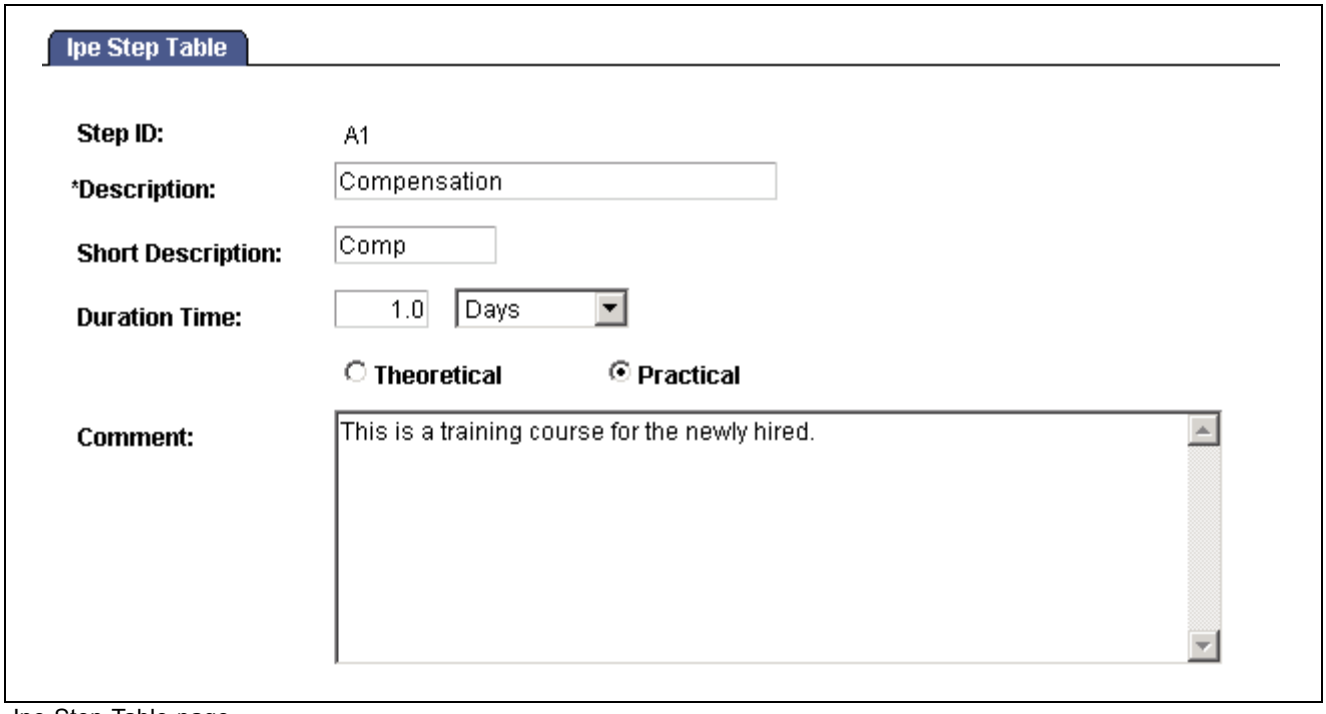
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Pages Used to Identify Steps, Group Steps, and Track Employee Progress

Page Name	Object Name	Navigation	Usage
Ipe Step Table (internal professional education step table)	IPE_STEP_TABLE	Set Up HRMS, Product Related, Enterprise Learning, Steps DEU, Ipe Step Table	Identify the steps that make up an educational training program.
Ipe Plan Table	IPE_PLAN_TABLE	Set Up HRMS, Product Related, Enterprise Learning, Plans DEU, Ipe Plan Table	Group the steps into a training plan.
Internal Profes. Education (internal professional education)	EE_IPE_PLAN	Enterprise Learning, Result Tracking, Internal Education DEU, Internal Profes. Education	Track the progress of German employees who are participating in the training plan.
Int. Prof Education Status (internal professional education status)	PRCSRUNCNTL	Enterprise Learning, Training Reports, Int Prof Education Status	This report (PER107GR) details the current status of employees who are enrolled in an internal education training plan. Includes only employees who selected the Intern check box and didn't select *Graduated* on the Professional Education page. This is a Crystal report.

Identifying the Steps for a Training Plan

Access the Ipe Step Table page.



Ipe Step Table page

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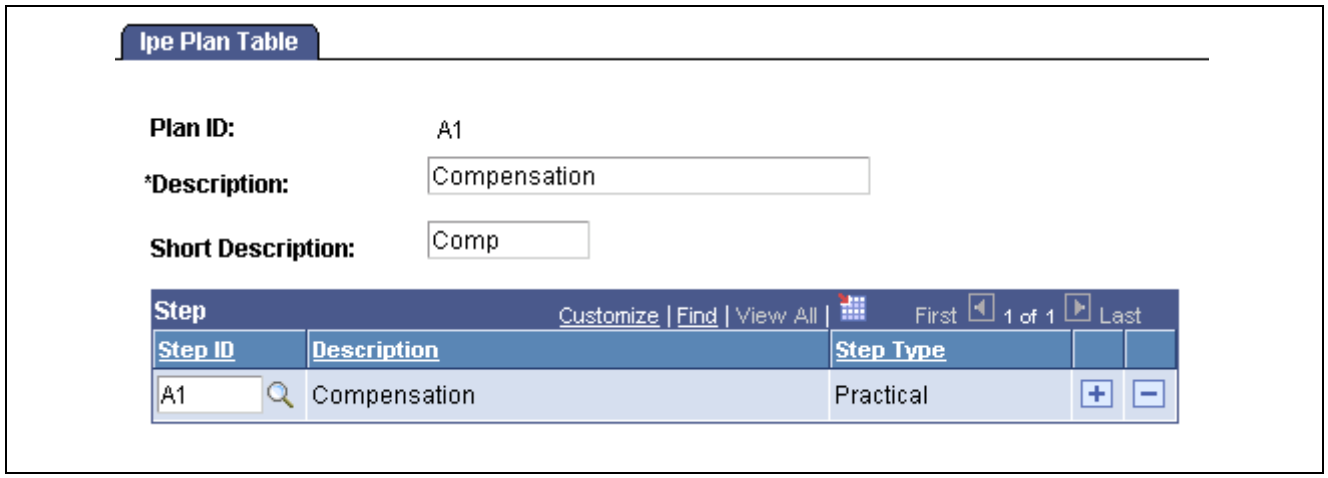
Duration Time Enter or update the numeric duration time of the step and select the type of measurement. Values are: *Days, Hours, Months, Weeks,* or *(none).*

The duration time that you enter isn't related to Budget Training duration units. These pages don't affect training cost calculations in Budget Training or Administer Training .

Theoretical/Practical These categories are used by German organizations for training reporting purposes.

Grouping the Steps into a Training Plan

Access the Ipe Plan Table page.



Ipe Plan Table

Step ID Add or delete the steps that make up this plan. When you add a step, the system displays information about the step.

Enrolling a Person into a Training Plan

To enroll an employee in training plans, create a profile or update the employee's existing profile using the Manage Profiles business process.

Note. Use the profile type PERSON to enroll employees in German internal training plans.

From the Person Profile page (Enterprise Learning, Result Tracking, Manage Person Profiles, Person Profiles):

1. Click the Education link to display the Education section of the profile.
2. Click Add New Degrees to add a new degree.

   The Add New Degree page is displayed.
3. Select the degree in the Degree field.
4. In the German section, select the Internal Professional Education check box.

   This enables you to track the employee's progress using the Internal Profes. Education page.
5. Complete the remaining fields as required
6. Click OK and then click Submit to update the profile.

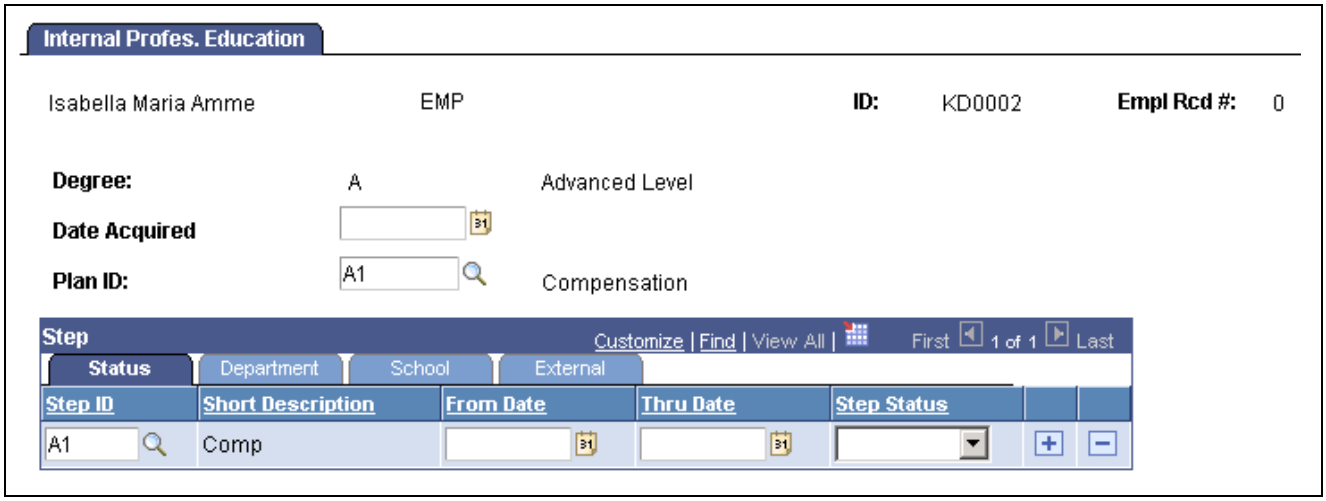
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See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Managing Profiles," Creating and Updating Person Profiles

Tracking Employee Progress

Access the Internal Profes. Education page (internal professional education page).



Internal Profes. Education page (internal professional education page)

Use this page to record additional educational information for German employees.

You can also track an employee's progress by printing the German Internal Professional Education Status report.

Note. Click the tabs in the scroll area for multiple views of this page. Document fields that are common to all views first.

Common Page Information

Degree Displays the degree that applies to this training plan.

Date Acquired Enter the date that the employee acquired the degree.

Plan ID When you move out of this field, the system displays the plan description and populates the Plan Step table on the page with any step IDs that are associated with this plan.

Step Displays the step IDs that are associated with the plan that you selected in the Plan ID field. You can update the step ID, business unit, and department default values for the plan ID on this page. You can also add step IDs that are not associated with the plan ID, to reflect any variations in the employee's training plan.

Status Tab

From Date and **Thru Date** (through date) Enter when the employee starts and finishes the step.

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CHAPTER 11

(FRA) Integrating with Enterprise Applications

This chapter provides an overview of Enterprise application integration and discusses how to:

- Track and process training data using Administer Training and Global Payroll.
- Track and process training data using Administer Training, Enterprise Learning Management and Global Payroll.
- Use Enrollment Pages to Manage Professionalization Contracts and DIF Entitlements.
- Validate training hours.
- Send DIF training data to the payroll system.
- Import Payroll data to Administer Training.

Understanding Integration with Enterprise Applications

This section discusses:

- Statutory requirements of the May 4 training law.
- Tracking and processing training data using Administer Training and Global Payroll.
- Tracking and processing training data using Administer Training, Enterprise Learning Management and Global Payroll.

Note. Administer Training and Enterprise Learning Management are integrated whether or not the customer uses Global Payroll

Statutory Requirements of the May 4 Training Law

Starting in the year 2004, the May 4 law requires enhancements to training administration in the following areas:

Area of Statutory Enhancement	Description
Training Categorization	All courses must be associated with one of the following categories: • Skills Development. • Adaptation to Job Changes. • Job Changes.

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Area of Statutory Enhancement	Description
Professionalization Contract	This contract affects salary calculations and the calculation of exemptions from social contributions.
DIF (*Droit Individuel à la Formation* [Individual Training Rights])	This entitlement specifies the number of hours that employees receive for training according to their seniority, contract type, and working hours.

Tracking and Processing Training Data Using Administer Training and Global Payroll

To track and process training data:

1. Use the Demand from Budget Training and Training Hours Details pages to:
    a. Indicate when enrollment in a course occurs as part of a professionalization contract.
    b. Indicate when enrollment in a course occurs for the purpose of skills development.
    c. Record DIF and non-DIF hours.
2. Validate DIF and skills development training hours and transfer these hours to the payroll system using the FRA Training Validation (GP) and FRA Training Validation (TRN) components.
3. Process payroll and calculate DIF and skills development entitlements (earnings) in Global Payroll for France based on the training hours validated in Step 2.
4. Import DIF balance data from Global Payroll for France into Administer Training using the writable array FOR WA DIF HR.

    Training administrators and others can then view this data on the enrollment pages in Administer Training to determine whether there are enough hours in a student's DIF balance to permit additional DIF allocations.

These steps can be represented as follows:

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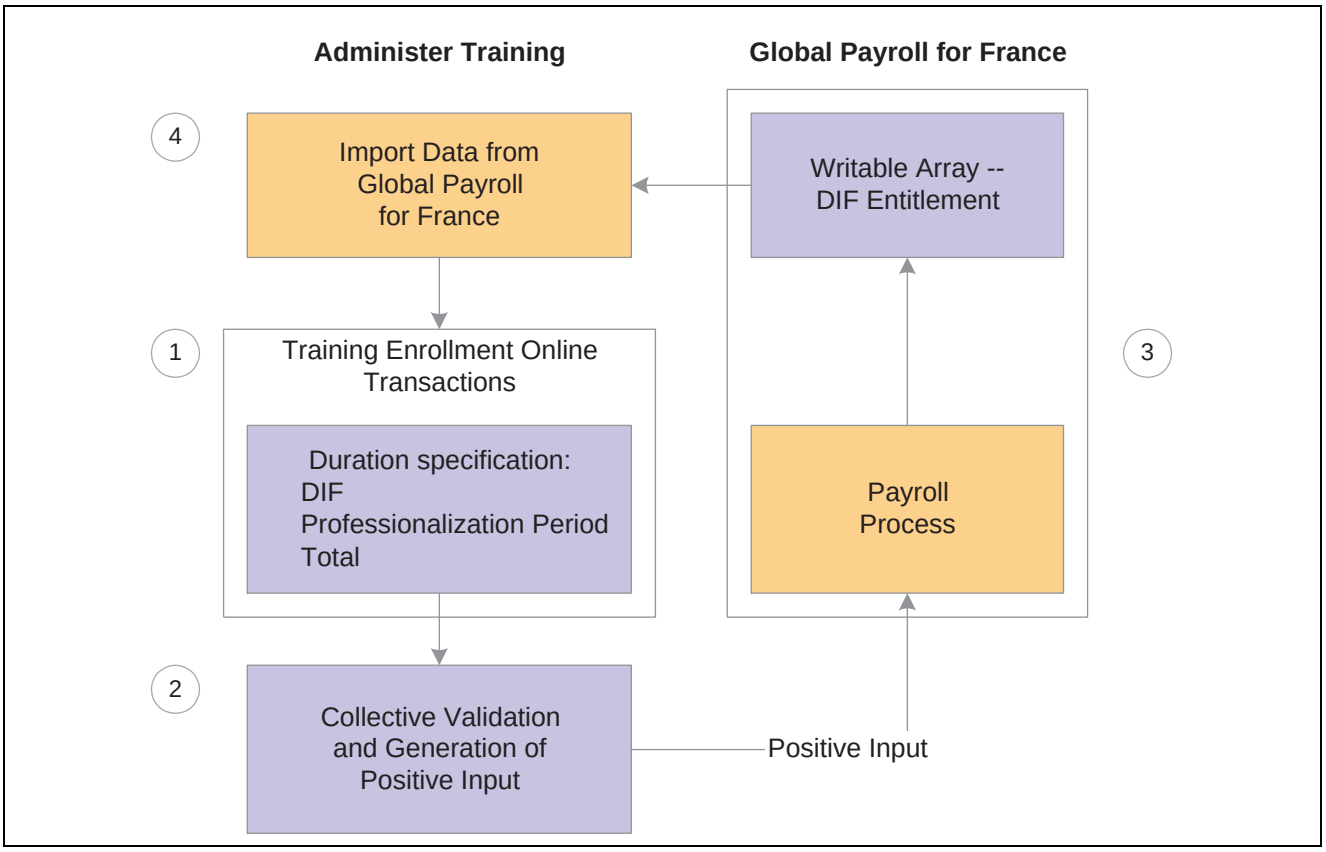


Diagram of training data tracking and processing

Tracking and Processing Training Data Using Administer Training, Enterprise Learning Management and Global Payroll

Enterprise Learning Management integrates directly with the Administer Training business process in Human Resources 8.9 and above and indirectly with Global Payroll for France 8.9 and above, enabling you to produce the 2483 report, track DIF balances, and compensate learners for DIF training hours and training hours done outside the normal work schedule. The three applications interact as follows:

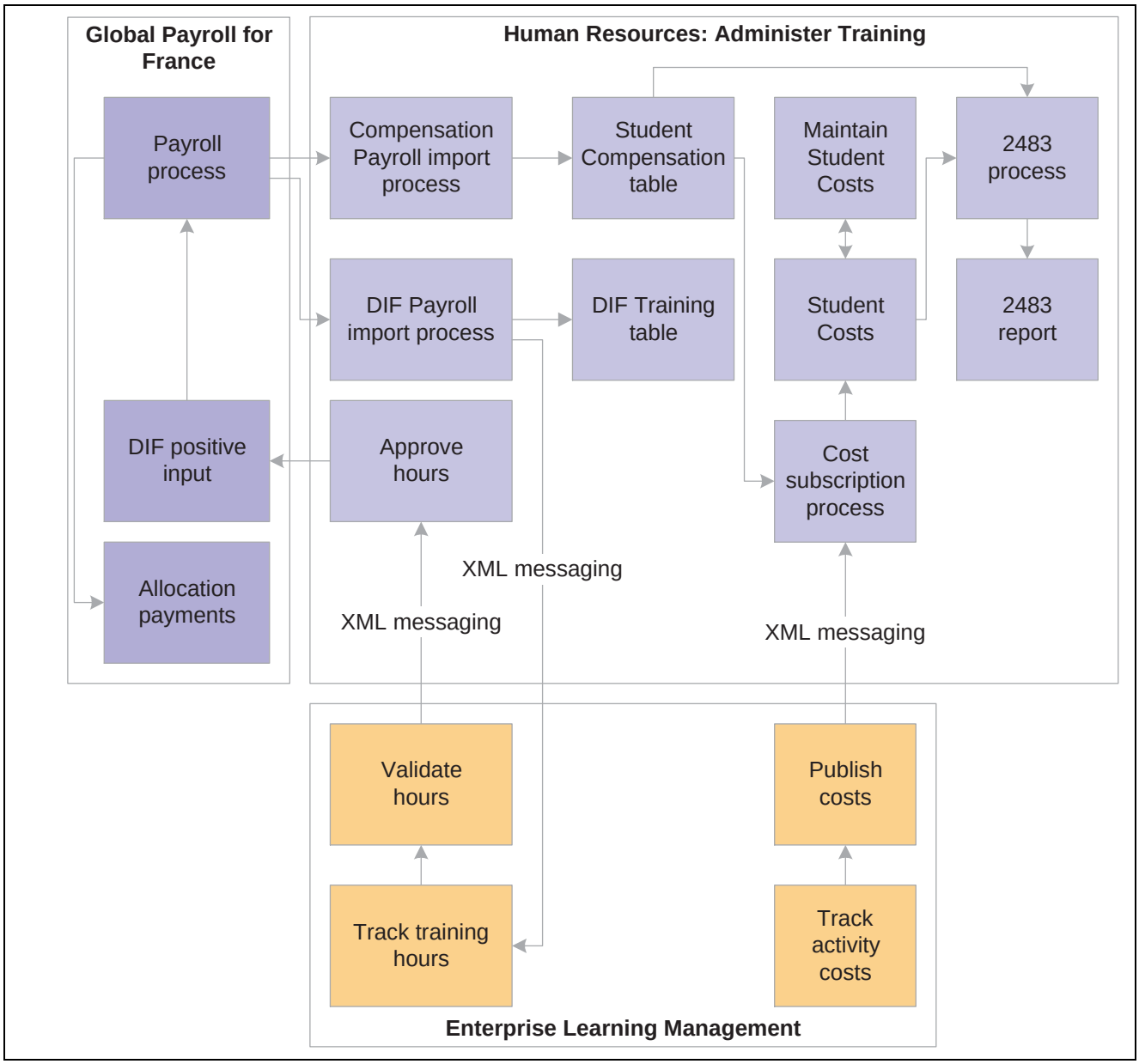
- Enterprise Learning Management is the application that you use to set up the learning catalog, instructors, vendors, and so on. You also use this application to track learning costs and to manage enrollment and other day-to-day tasks.
- The Administer Training business process compiles information provided by Enterprise Learning Management and payroll and generates the 2483 report.
- Global Payroll for France computes learner and instructor salaries for the 2483 report and calculates learners' DIF entitlement balances.

  It also calculates the salary for training hours done outside of normally scheduled work hours.

Important! When you use Enterprise Learning Management to set up and track learning, do not use the Administer Training business process for those tasks. Use the Administer Training business process to configure and generate the 2483 report only. A permission list designed for Enterprise Learning Management users provides access to the Administer Training pages that are needed to set up and generate the 2483 report. In this case, the Enterprise Learning Management check box must be selected in the Products page of the Installation Table.

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The following diagram shows the relationships between the three applications.



Administer Training Integration with Enterprise Learning Management and Global Payroll

Integration Points

Enterprise Learning Management uses integration points to publish information to Human Resources and to subscribe to information provided by that application. Following is a list of the full sync and incremental sync integration points that are used to track learning costs and hours.

Note. The full sync messages can generate a high volume of data. Use these messages only if you need to resynchronize HR data and Enterprise Learning data during the integration process.

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Message Name	Message Handler /Application Class	Records Populated in Enterprise Learning Management	Explanation
TRAINING_HOUR_SYNC (incremental sync) TRAINING_HOUR_ FULLSYNC (full sync)	Not applicable	Not applicable.	Outbound message that publishes validated training hours and DIF information to Human Resources. The incremental sync message is triggered by the LM_STD_HOUR Application Engine process that is launched through the Export Learning Hours page. The full sync message is triggered from an option on the same page.
TRN_HOUR_ACK_SYNC (incremental sync) TRN_HOUR_ACK_ FULLSYNC (full sync)	DEFAULT	LM_STG_TRKHOUR (staging table) LM_ENR_LC_TBL	Incoming message from HR. The message retrieves an acknowledgement of action taken in Human Resources and updates the Hour Tracking Status field on the Training Hour Validation page.
DIF_BALANCE_SYNC (incremental sync) DIF_BALANCE_ FULLSYNC (full sync)	DEFAULT	LM_STG_DIFHIST (staging table) LM_DIFHIST_TBL	Incoming message that subscribes to the DIF balance information computed by the payroll engine. DIF balances appear on the enrollment pages.

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Message Name	Message Handler /Application Class	Records Populated in Enterprise Learning Management	Explanation
STUDENT_COST_ FULLSYNC (incremental sync) STUDENT_COST_SYNC (full sync)	Not applicable.	Not applicable.	Outbound message that publishes cost data to Human Resources for inclusion in the 2483 report. Message is based on the LM_ENRLMT_COST table. The incremental sync message is triggered by the LM_STD_COST Application Engine process that is launched through the Export Learning Cost page. The full sync message is triggered from an option on the same page.
COST_ACK_SYNC (incremental sync) COST_ACK_FULLSYNC (full sync)	DEFAULT	LM_STG_TRKCOST (staging table) LM_ENR_LC_TBL	Incoming message that subscribes to the cost acknowledgement sent by Human Resources. This message includes a status field that informs the administrator about the action done by the HR administrator.

Setting Up Enterprise Learning Management Integration

The following setup steps are required to configure Administer Training to integrate with Enterprise Learning Management:

1. Activate the integration points.
2. Assign a new French permission list.

Receiving Data from Enterprise Learning Management

Upon receiving data from Enterprise Learning Management, the administrator takes the following steps:

1. Prepare the 2483 Report.
    a. Import data from Enterprise Learning Management.
    b. Run the 2483 report.
2. Transfer DIF hours, training hours done outside the working schedule, and skills development data to the payroll system using the FRA Training Validation (GP) component.

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Validating Training Hours

This section discusses how to:

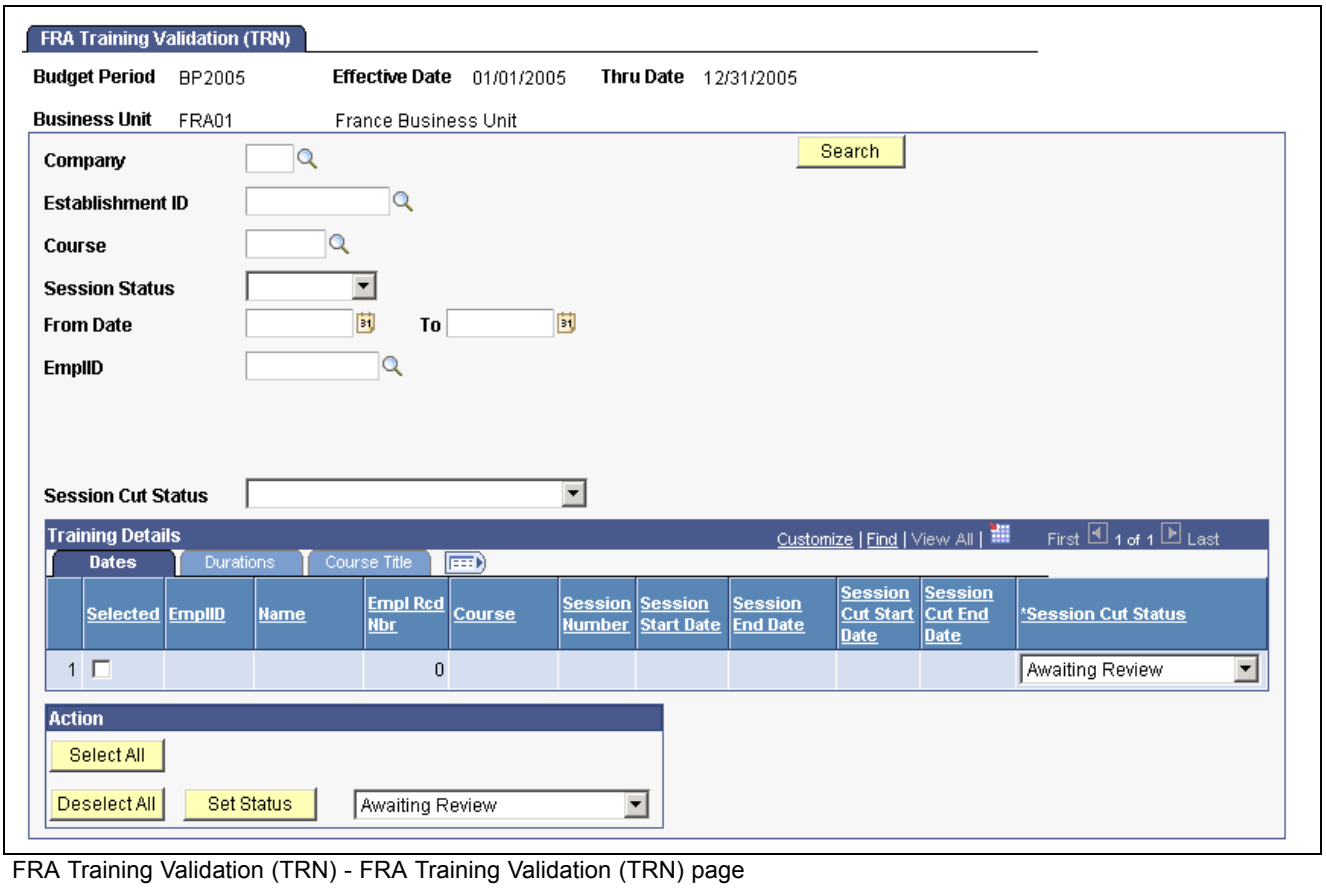
- Validate training hours as a training administrator.
- Validate training hours as a payroll administrator.

Pages Used to Validate Training Hours

Page Name	Object Name	Navigation	Usage
FRA Training Validation (TRN) - FRA Training Validation (TRN)	TRN_COL_VALIDATION	Enterprise Learning, Result Tracking, FRA Training Validation (TRN), FRA Training Validation (TRN)	Validate training hours (training administrator view).
FRA Training Validation (GP) - FRA Training Validation (TRN)	TRN_COL_VALIDATION	Enterprise Learning, Result Tracking, FRA Training Validation (GP), FRA Training Validation (TRN)	Validate training hours (payroll administrator view) and send DIF data to the payroll system for processing.

Validating the Training Data as a Training Administrator

Access the FRA Training Validation (TRN) - FRA Training Validation (TRN)page.



FRA Training Validation (TRN) - FRA Training Validation (TRN) page

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The FRA Training Validation (TRN) page enables training administrators to validate training data before it is sent to payroll for processing. Because the fields on this page are almost identical to those on the FRA Training Validation (GP) - FRA Training Validation (TRN) page, we describe only the differences between them in this section.

Note. For information about the fields that are shared by these components, review the section titled *Validating Training Data as a Payroll Administrator*.

The Pay Group and Calendar ID filters are available only on the payroll administrator version of the FRA Training Validation component. The Calendars tab appears only on the payroll administrator version of the FRA Training Validation component.

Company This filter selects students that have the specified company in their training record.

Note. Only companies that are part of the business unit can be selected.

Establishment ID This filter selects students that are part of the specified establishment based on the department stored in the training record.

Note. Only establishments related to the specified company are available for selection. When no company is selected, all establishments for the business unit can be used.

Course This filter selects courses from the training record.

Note. Only courses with session dates that occur during the budget period can be selected.

Session Status Valid values are *Active, Canceled*, and *Complete*.

This filter selects course sessions that have the specified attendance status in the training record.

From Date and To This filter selects course session cuts with a start date greater than or equal to the specified From Date and with an end date less than or equal to the To date.

Note. You can enter any from or to dates included in the budget period.

EmplID This filter selects students from the training record.

Note. When you filter by company and/or establishment, only employees belonging to the company or establishment appear in the prompt. Otherwise, any employee in the business unit can be selected.

Session Cut Status Valid values are:

- *None:* No filter is used and all sessions are selected.
- *Awaiting Review:* Only session cuts with this status are selected.
- *Appr by Training Administrator:* Only session cuts with this status are selected.

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- *Appr by Payroll Administrator:* Only session cuts with this status are selected.
- *Finalized:* Only session cuts with this status are selected.

Note. Define the status of a session cut on the Training Hours Details page.

Action

Use the fields in the Action group box to select or deselect students in the grid and then update the Calendar and Session Cut Status fields in all selected rows.

Set Calendar

Select to set a default calendar for all selected session cuts.

You can set calendars by *Start Date* or *End Date*.

This button and the start and end date options in the drop down list are visible only in the payroll administrator version of this component.

When you click the Set Calendar button, the application sets the calendar for the current employee ID, employee record number, and pay group. If the employee record number or the pay group have not been previously specified, the system provides a default value for the employee record number and the pay group. It then retrieves the first payroll calendar that is not finalized with a period that includes the Start Date or the End Date (depending on your selection).

The system retrieves the employee record and pay group from the JOB DATA record. The values retrieved are those associated with the employee's primary job.

Note. The employee record and paygroup are populated when you click the search button on the FRA Training Validation page.

Note. This feature applies only to students processed with Global Payroll for France.

Set Status

Click this button to define the session cut status for all selected sessions cuts.

Valid values are:

- *Awaiting Review*.
- *Appr by Payroll Administrator*.
- *Appr by Training Administrator*.

The same rules that apply to status values defined using the Session Cut Status field apply to values defined using the Action group box.

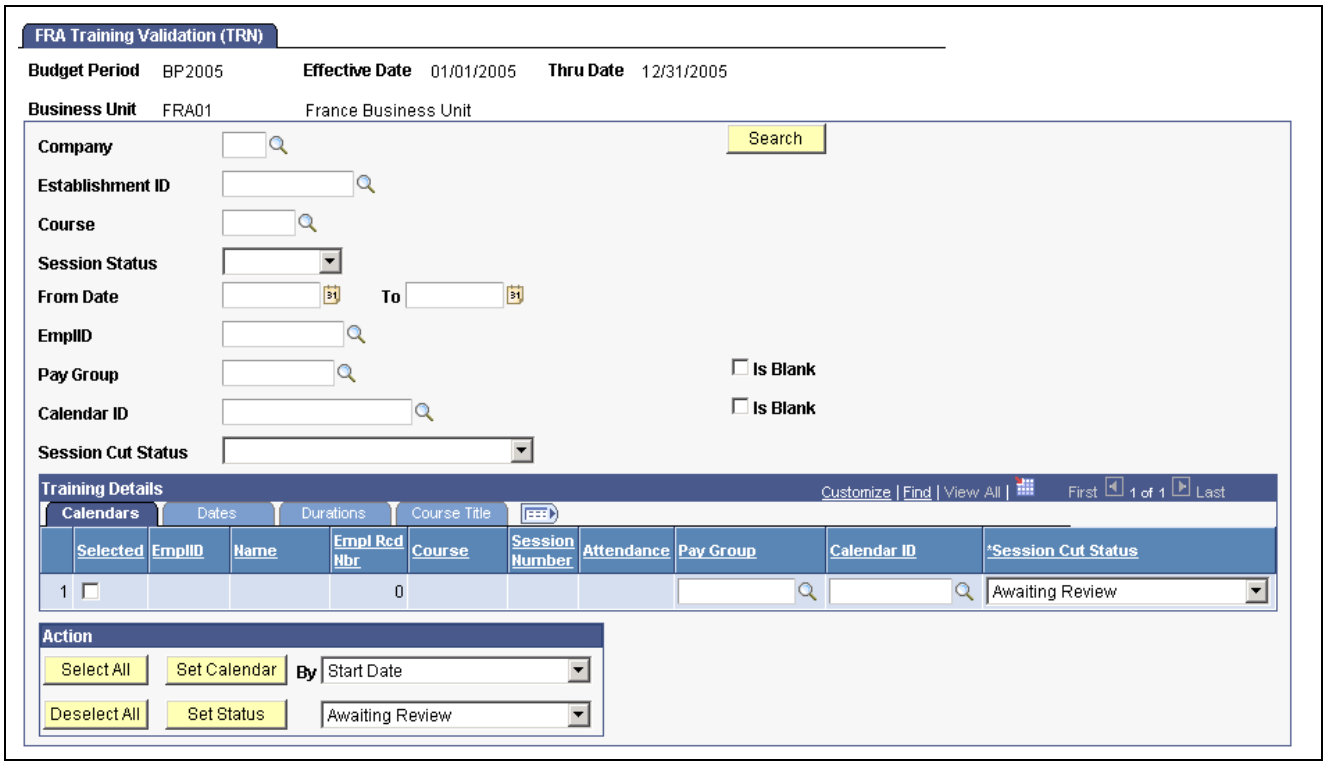
Note. You can change the status to *Awaiting Review* from *Appr by Training Administrator* or *Appr by Payroll Administrator*. You can also change the status to *Appr by Training Administrator* from *Appr by Payroll Administrator*. However, you cannot change the status with this button after it is set to *Finalized*.

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Note. When you click Save, the system sends all rows with the status *Appr by Payroll Administrator* to Global Payroll as positive input for processing in the next payroll run. When the system generates positive input for a session cut, it automatically sets the session cut status to *Finalized*. You cannot modify this status. If you need to make changes to the positive input data, you must make them directly in the payroll application.

Validating Training Data as a Payroll Administrator

Access the FRA Training Validation (GP) - FRA Training Validation (TRN) page.



FRA Training Validation (GP) - FRA Training Validation (TRN) page

To limit the scope of the information displayed, you must specify the Business Unit when entering the component.

When you are in the component, use one or more of the filters described here to limit the students and course sessions displayed in the Training Details group box:

Pay Group

This filter selects students who are managed by Global Payroll for France and who are part of the specified pay group. Students managed by other payroll systems are not selected or excluded by this filter.

Select the related Is Blank check box to indicate that you want the system to retrieve students for whom there is no pay group in the Global Payroll pay group table.

Note. This filter is available only in the payroll administrator version of the FRA Training Validation component if the Global Payroll for France product is installed.

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Calendar ID This filter selects students who are managed by PeopleSoft Enterprise Global Payroll for France and who are included in the specified calendar. Students managed by other payroll systems are not selected or excluded by this filter.

Select the related Is Blank check box to indicate that you want the system to retrieve students for whom there is no calendar ID in the Global Payroll calendar table.

Note. This filter is available only in the payroll administrator version of the FRA Training Validation component if the Global Payroll for France product is installed.

Session Cut Status This field is similar to the Session Cut Status field on the FRA Training Validation (GP) page; however, training administrators cannot change the Session Cut Status to *Appr by Payroll Administrator* on the training administrator component. If the training administrator attempts to apply this status to a row of data, the following warning message appears: *You are not authorized to change the status*.

Note. Only payroll administrators are authorized to set the status of a session cut to *Appr by Payroll Administrator* and send validated training data to payroll for processing. The payroll administrator can do this only on the FRA Training Validation (GP) page.

Search Click this button to refresh the session cuts listed in the grid at the bottom of the page based on the selected filters.

Note. You can change the pay group, the calendar ID, and the Session Cut Status within the grid; however, you should use caution when doing this, as these changes are recorded in the database when you click the Save button (changing the values of filter fields is not considered a data change because these values are not stored in the database).

Training Details-Calendars

Select the Calendars tab.

The fields on the Calendars tab are populated when you click the Search button

This tab appears only on the Payroll Administrator version of the FRA Training Validation component.

Selected Use this check box to select rows on which to apply an action. The proposed actions are shown in the Action group box at the bottom of the page.

Empl Rcd Nbr The system retrieves the employee record number from the training record.

Pay Group This field appears only for employees processed using Global Payroll for France.

If you do not specify the pay group in the search criteria, the system retrieves the pay group from the JOB DATA record for the employee identified in the grid with the maximum job effective date less than or equal to the session cut start date.

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Note. The employee record and paygroup are populated when you click the search button on the FRA Training Validation page.

Calendar ID

This field appears only for employees processed with Global Payroll for France. It is enabled only if the session cut status is *Awaiting Review* or *Appr by Training Administrator*.

The prompt displays the list of monthly payroll calendars from the Global Payroll calendar setup table that meet the following criteria: period begin date <= session cut start date/end date (depending on the calendar selection specified in the Action group box) <= period end date.

When the calendar is finalized, the letter "F" appears in the grid near the calendar field to warn users that there may be retroactive processing if the training information is saved to the database.

Warning! Sending training information to a finalized calendar may trigger retroactive processing.

Session Cut Status

This field appears on all three tabs in the Training Details group box.

Valid values are:

- *Awaiting Review*: When you set this status, the Empl Rcd Nbr, Pay Group, and Calendar ID fields are enabled.
- *Appr by Payroll Administrator*: When you set this status, the Empl Rcd Nbr, Pay Group, and Calendar ID fields are disabled.

  If the session cut extends beyond the calendar period, the following warning message appears: *This session spreads over multiple calendars. Please make sure that the correct calendar is assigned.*

  If the payroll administrator tries to approve a finalized calendar, the following warning message appears: *The selected calendar is finalized.* This message warns the administrator that there may be retroactive processing if the training information is saved to the database.
- *Appr by Training Administrator:* When you set this status, the Empl Rcd Nbr, Pay Group, and Calendar ID fields are enabled.
- *Finalized*: You cannot manually set the status to *Finalized*. This status appears only when the training information has been validated and sent to the payroll system. To send the data to the payroll system, set the status to *Appr by Payroll Administrator* and save the page.

Note. This field and its associated values are also available on the training administrator version of the FRA Training Validation component. However, when the training administrator tries to set the status to *Appr by Payroll Administrator*, an error message appears: *You are not authorized to change the above status.* By contrast, payroll administrators are authorized to change the status to *Appr by Training Administrator*. If an employee has both the Training Administrator and Payroll Administrator roles, he can skip the Training Validation (HR) page and set both statuses on the Training Validation (GP) page.

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Note. When you save the page, the row with the *Appr by Payroll Administrator* status is disabled and you can no longer modify the data.

Training Details-Dates

Select the Dates tab.

The fields on the Dates tab are populated when the payroll administrator clicks the Search button.

The fields on this tab appear on both the payroll administrator and training administrator versions of the FRA Training Validation component.

Session Start Date This field displays the start date of the entire training session.

This is the date defined on the Course Session Profile page (Enterprise Learning, Define Course/Cost Details, Course Sessions).

Session End Date This field displays the end date of the entire training session.

This is the date defined on the Course Session Profile page.

Session Cut Start Date This field displays the session cut start date.

This is the date defined on the Location, Instructor page (Enterprise Learning, Define Course/Cost Details, Course Sessions).

Session Cut End Date This field displays the session cut end date.

This is the date defined on the Location, Instructor page.

Session Cut Status This is the same field described in the section on the Calendars tab.

Training Details-Durations

Select the Durations tab.

The fields on the Durations tab are populated when the payroll administrator clicks the Search button.

The fields on this tab appear on both the payroll administrator and training administrator versions of the FRA Training Validation component.

Session Cut Duration This field displays the duration in hours of the session cut. This information comes from the Demand From Budget Training component (TRN_STUDNT_CRS_DT2).

DIF in working Schedule This field displays the duration in hours entered in the Demand From Budget Training component.

This information is sent to the payroll system when the row is approved and saved.

DIF out of working Schedule This field displays the duration in hours entered in the Demand From Budget Training component.

This information is sent to the payroll system when the row is approved and saved.

Out of working Schedule This field displays the duration in hours for skills development entered in the Demand From Budget Training component.

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This information is sent to the payroll system when the row is approved and saved.

Session Cut Status This is the same field described in the section on the Calendars tab.

Action

You cannot set the session cut status to *Appr by Payroll Administrator* for multiple students using the mass update capabilities provided by the fields in the Action group box.

The Set Calendar button is not available in the training administrator version of the FRA Training Validation component.

Sending DIF Training Data to Global Payroll

This section provides an overview of how the PeopleSoft system sends DIF training data to Global Payroll for processing.

Understanding How Data is Sent to The Global Payroll

When the payroll administrator saves the DIF training hours on the FRA Training Validation (GP) page, the system creates positive input for the current pay group, calendar, employee ID, and employee record number. This data triggers processing of one or more DIF entitlement (earning) elements in the next Global Payroll run. When the system generates positive input for a session cut, it sets the session cut status to *Finalized* on the FRA Training Validation (GP) and FRA Training Validation (TRN) components.

This table lists the *in working hours* DIF entitlement elements for which the system creates positive input:

Payroll Element	Description
HRS DIF PEND	When DIF hours within the work schedule are > 0, the system assigns the earning HRS DIF PEND to the payee using positive input. This earning has a calculation rule of Amount. The amount is defined as the formula FOR FM DIF PENDANT.
FOR VR HRS DIF	This variable stores DIF hours within the work schedule to process in the current payroll calendar. These hours are used by the formula FOR FM DIF PENDANT to calculate the earning element HRS DIF PEND. It is populated using a supporting element override.

This table lists the *out of working hours* DIF elements for which the system creates positive input:

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Payroll Element	Description
HRS DIF HORS	When DIF hours outside the normal work schedule are > 0, the system assigns the earning HRS DIF HORS to the payee using positive input. This earning has a calculation rule of Unit x Rate, with the rate defined as the formula FOR FM TX DIF-DEV, and the unit defined as the formula FOR FM DIF HORS.
FOR VR HRS DIF	This variable stores DIF hours for training that takes place outside of the normal work schedule to process in the current payroll calendar. It is populated using a supporting element override.
FOR VR DT DEB FOR	This variable stores the session cut start date for DIF training that occurs outside of normal work hours. It is populated using a supporting element override.

This table lists the *out of working schedule training hours* elements for which the system creates positive input:

Payroll Element	Description
HRS DEV HORS	When skills development hours outside the normal work schedule are > 0, the system assigns the earning HRS DEV HORS to the payee using positive input. This earning has a calculation rule of Unit x Rate, with the rate defined as the formula FOR FM TX DIF-DEV, and the unit defined through payee level input.
FOR VR DT DEB FOR	This variable stores the session cut start date for skills development training that occurs outside of normal work hours. It is populated using a supporting element override.

Importing Payroll Data Into Administer Training

This section provides an overview of the data import process and discusses the page used to import payroll data into Administer Training from Global Payroll for France.

Understanding the Data Import Process

When you run the Global Payroll process, the system calculates both the DIF entitlement balance (FOR AC DROIT DIF) and DIF in advance hours (FOR VR DIF NEGATIF) for all trainees and loads this data into a table using the writable array FOR WA DIF HR. When you run the import process on the DIF Payroll Import page, the system imports the entitlement balance and DIF in advance from this table into Administer Training. You can then view this information on the enrollment pages and determine whether there are enough hours in a student's DIF balance to permit additional DIF allocations.

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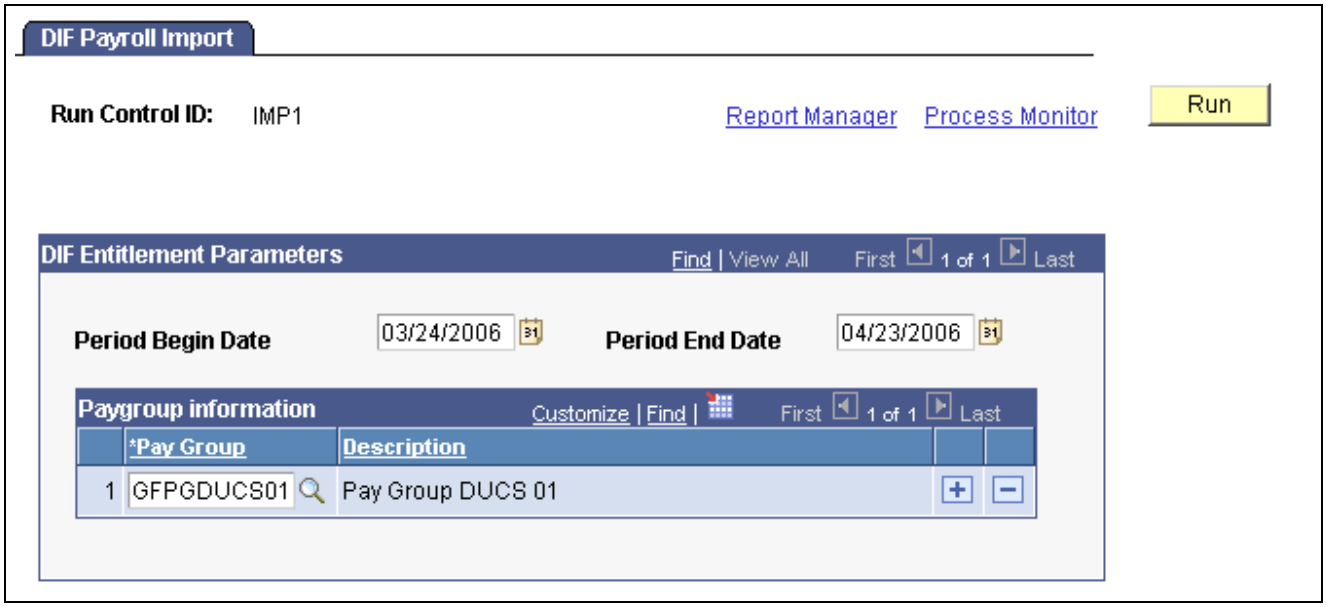
Note. The element FOR AC DROIT DIF stores the DIF entitlement balance and is calculated as the trainee's DIF allocation minus the DIF hours already used. The element FOR VR DIF NEGATIF stores the number of hours of additional DIF training (DIF in advance) that can be granted beyond what is available in the DIF balance. When you run the import process, the value of these elements appears on the Training Hours Details page.

Page Used to Import Data Into Administer Training

Page Name	Object Name	Navigation	Usage
DIF Payroll Import	RUNCTL_TRN_DIF	Enterprise Learning, Result Tracking, DIF Payroll Import FRA, DIF Payroll Import	Import DIF data into Administer Training.

Importing Data

Access the DIF Payroll Import page.



DIF Payroll Import page

Period Begin and End Date Enter the dates of the payroll period for which you want to retrieve data.

Pay Group Specify the pay group for which you want to retrieve the DIF data.

Run Click to initiate the import process.

Note. Depending on company policy, you can allocate DIF training hours that exceed the entitlement balance by allowing the DIF entitlement to go into negative numbers. For example, if a trainee's DIF entitlement balance is 2, you can grant a total of 7 DIF hours by enabling the DIF entitlement balance to drop to –5. To do this, access one of the supporting element override pages in Global Payroll and set the value of FOR VR DIF NEGATIF to 5.

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Note. This same process is used to both retrieve the hours from Global Payroll and for publishing them into ELM when the ELM product is flagged in the Installation table.

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CHAPTER 12

(FRA) Producing the French Training Report 2483

This chapter provides an overview of the French Training Report 2483 process and discusses how to:

- Review the setup for groups and indicators.
- Enter additional report parameters.
- Run the report process and review results.
- Run the report.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Meet Regulatory Requirements, "(FRA) Meeting Regulatory Requirements for France," Preparing and Running the Training 2483 Report

Understanding the French Training Report 2483 Process

The Training Report 2483 (TRN029), also called the Declaration 2483 Report, is a French regulatory report that is used to declare the vocational training that your company has provided to its employees. This report compiles information about the amount of money that your company spends on training.

The report provides details for groups of information that are defined by the French government. PeopleSoft delivers the groups as system data in Human Resources.

Note. Any changes that you make to these groups directly affect the way that the system generates the French Training Report 2483. Therefore, you should make changes only in response to changes in the French regulatory reporting requirements.

Here is an overview of how to prepare the Training Report 2483:

1. Trainings are recorded, employees are enrolled, and costs are associated with those trainings/students.
2. (Optional) Review the setup for training report groups.
3. (Optional) Review the setup for training report indicators.
4. Enter training report parameters.
5. Run the Compute Training Report 2483 (DEC2483) process calculation for all indicators.
6. (Optional) Review and edit the results of the process calculations.
7. Run the Training Report 2483 (TRN029) to print (or export to a file) the results of the process calculations .

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Note. When using ELM and Administer Training, the setup of the learning catalog, instructors, vendors, and so on, as well as tracking of learning costs and enrollment and other day-to-day tasks should be done in ELM. In this case, the Administer Training components are used to compile costs and generate the 2483 reports.

See Also

Chapter 3, "Setting Up Training Costs," page 39

Chapter 7, "Enrolling and Wait-Listing Students," page 139

PeopleSoft Enterprise Learning Management 9.0 PeopleBook, (FRA) Managing French Regulatory Requirements

Reviewing the Setup for Groups and Indicators

This section discusses how to:

- Review the group setup.
- Review the indicator setup.

Pages Used to Review Training Report Groups and Indicators

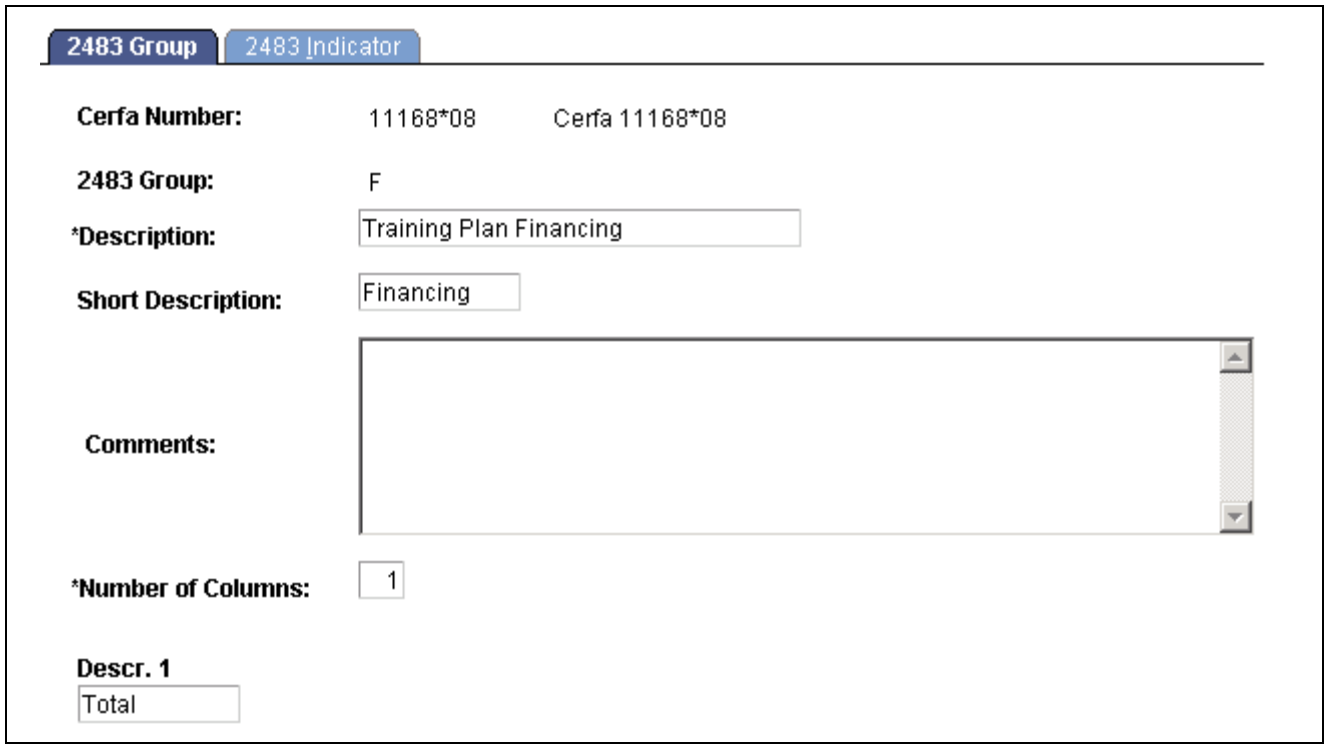
Page Name	Object Name	Navigation	Usage
2483 Group	GROUP_2483_TBL_FRA	Set Up HRMS, Product Related, Enterprise Learning, 2483 Indicators FRA, 2483 Group	Review the group setup for the French Training Report 2483.
2483 Indicator	INDIC_2483_TBL_FRA	Set Up HRMS, Product Related, Enterprise Learning, 2483 Indicators FRA, 2483 Indicator	Review the indicator setup for the French Training Report 2483 groups.

Reviewing the Group Setup

Access the 2483 Group page.

Information in the 2483 report is organized by group. The groups are identified by a letter, for example, C represents Training Costs and D represents OPCA Designation.

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2483 Group page

Comments Comments that you enter here do not appear on the report.

Number of Columns This field controls the number of columns that the report includes, by default, for this group. It also controls the number of Descr (description) fields that display on this page.

Descr. 1...Descr. 6 (Description 1...Description 6) These fields define the column labels that appear in the report for the group, by default.

When you use the 2483 Indicators page to define a new indicator for a group, the indicator inherits the default values for columns and descriptions that are defined here.

The following groups (used in the 2483 Group field) are delivered with Human Resources:

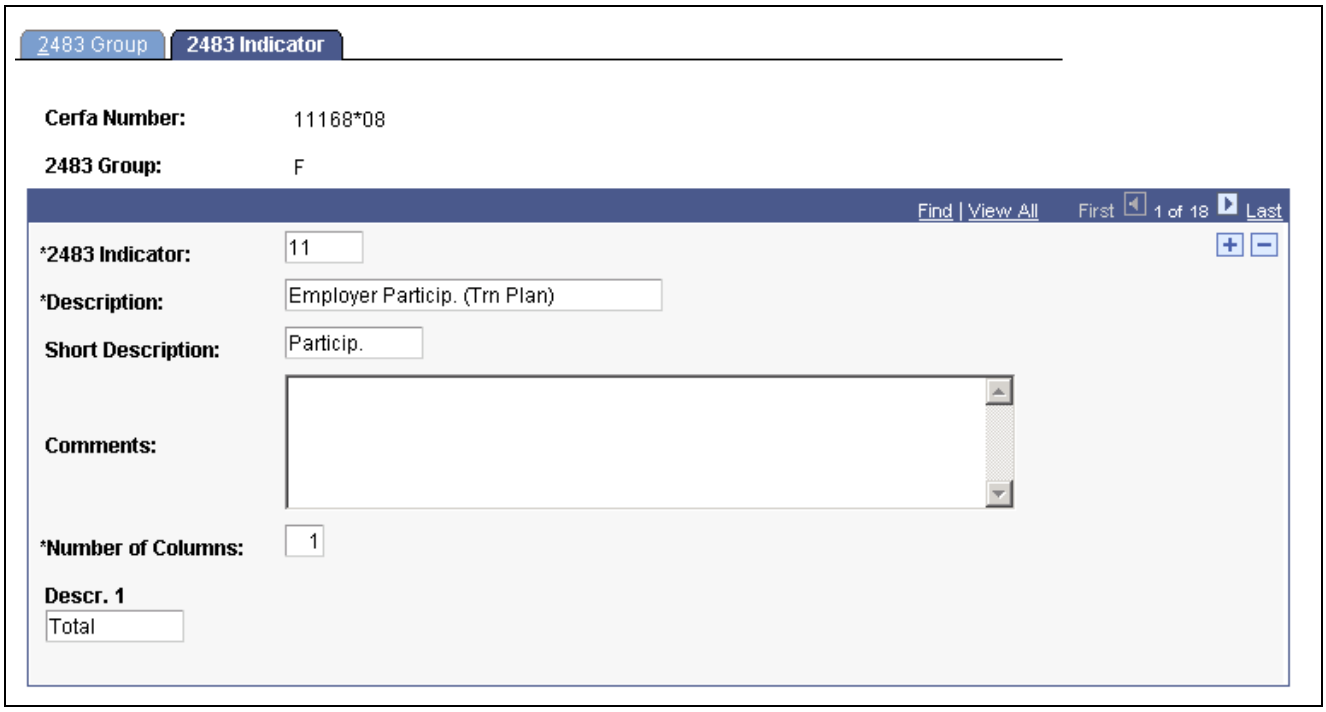
Group ID	Description
A	Monthly average headcount
B	Headcount, Training Hours **Note.** (FRA) For indicators 11 and 12, when running the 2483 Computation process on Sybase, the process does not check if the cost is fully chargeable for the company or not. In other words, the training is included in the indicator count even if financing costs exist for training.
C	Total Compensation

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Group ID	Description
D	Training Leave Financing
E	Professionalization Financing
F	Training Plan Financing
G	CDD Training Leave Financing
H	Public Revenue Dept Payment
I	Carry-Forward Surplus

Reviewing the Indicator Setup

Access the 2483 Indicator page.



2483 Indicator page

Each group can include multiple indicators. Use this page to view the indicators that are associated with a particular group.

PeopleSoft provides the appropriate labels for each column. The report prints the values in the Descr 1 through Descr 6 fields as the indicator labels on the French Training Report.

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Entering Additional Report Parameters

The 2483 report requires additional parameters that are not stored in Human Resources. Before you run the report, you must enter these parameters into the system.

This section discusses how to:

- Enter 2483 report parameters.
- Enter company costs.

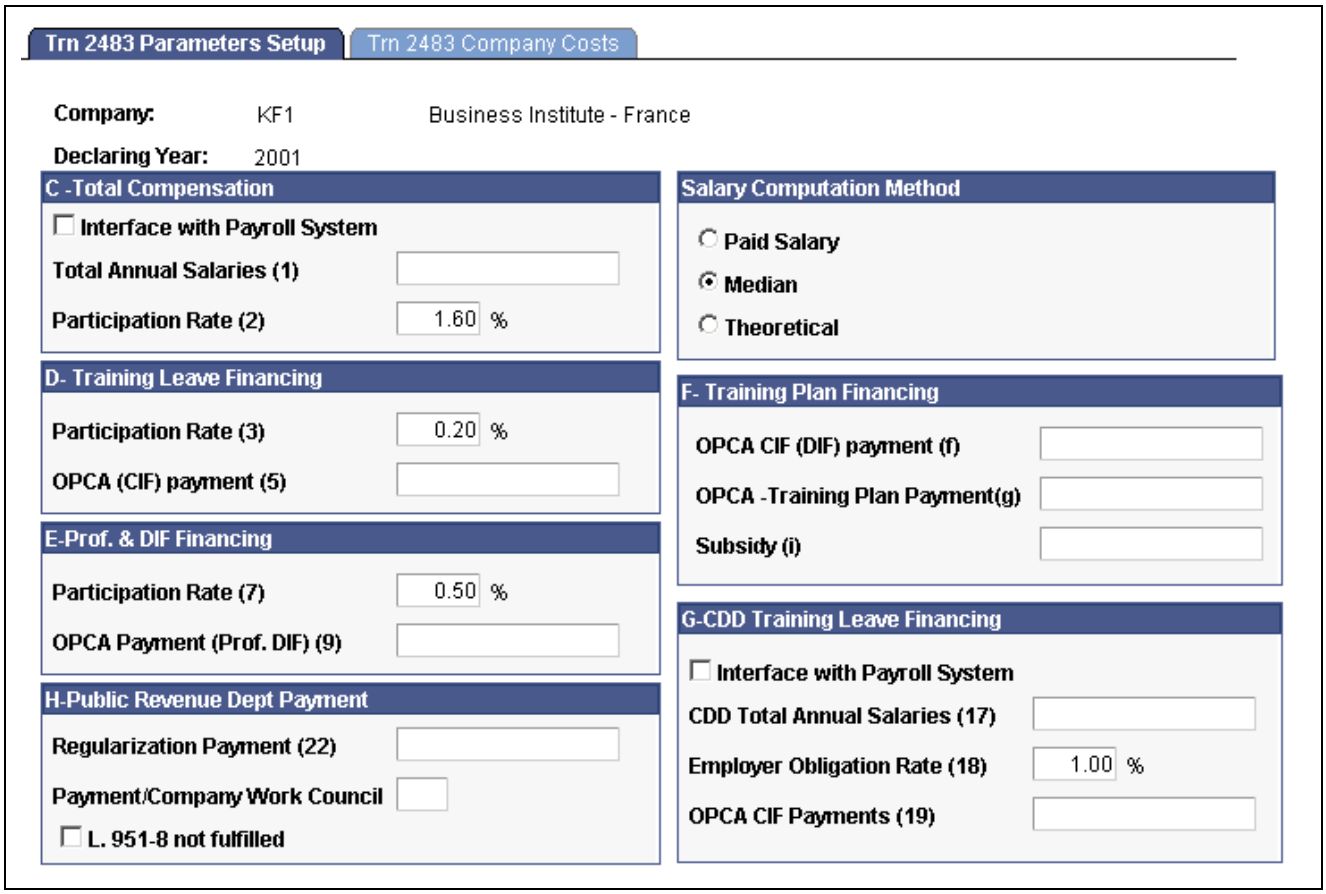
Pages Used to Enter Additional Report Parameters

Page Name	Object Name	Navigation	Usage
Trn 2483 Parameters Setup (training 2483 parameters setup)	TRN_2483_PARM	Set Up HRMS, Product Related, Enterprise Learning, 2483 Parameters FRA, Trn 2483 Parameters Setup	Enter parameters that are required for the 2483 report. This page is dedicated to one company and one declaring year.
Trn 2483 Company Costs (training 2483 company costs)	TRN_2483_CPNY_COST	Set Up HRMS, Product Related, Enterprise Learning, 2483 Parameters FRA, Trn 2483 Company Costs	Enter costs related to a civil year (2483 declaring year). These costs are dedicated to the 2483 report and are not included in the computation of other training processes.

Entering 2483 Report Parameters

Access the Trn 2483 Parameters Setup page.

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Trn 2483 Parameters Setup page

Group C - Total Compensation

Interface with Payroll System (reduction rate [10 employee mark])

Select if the amount of total compensation is to be calculated from the salaries the system retrieves from Global Payroll.

Note. When Interface with Payroll System is selected, the field Total Salaries (1) is unavailable.

Total Annual Salaries (1)

Enter the total of the annual salaries for your organization.

Participation Rate (2)

Enter the rate applied to the Total Annual Salaries to calculate the amount that the company should spend on Trainings. This rate equals 1.6 by default.

Salary Computation Method

These options are used to estimate the employee salary costs that are charged in the 2483 report.

Paid Salary

When you select this option, the Compute 2483 process prorates the employee's monthly salary for each session and then calculates the sum for all sessions.

The system validates that the Paid Salary method is consistent with the salaries stored on the Update Salary Costs page, Period tab. All employees for the related company and related year should have the Calc. Flag field equal to *Payroll* or *Manually.*

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Median When you select this option, the Compute 2483 process divides the total training hours (the duration of all sessions) by total paid hours and multiplies the result by an employee's average annual salary. Salaries come from Global Payroll for France or are entered manually.

The system verifies that the Median method is consistent with the salaries stored on the Update Salary Costs page, Period tab. All employees for the related company and related year should have the Calc. flag equal to *Payroll*, *Job Code*, or *Manually.* This option is the default.

Theoretical The theoretical method is similar to the median method and should be selected when salaries have been entered manually or have been defined for each job code. When you select this option, the Compute 2483 process divides the total training hours (based on session duration) by total paid hours and multiplies the result by the employee's annual compensation. The system verifies that the Theoretical method is consistent with the salaries stored on the Update Salary Costs page, Period tab. All employees for the related company and related year should have the Calc. flag equal to *Employee*, *Job Code*, or *Manually.*

Group D - Training Leave Financing

Participation Rate (3) Enter the rate applied to the Total Annual Salaries to calculate the amount that the company should spend on Training Leaves (CIF in French). This rate equals 0.2 by default.

OPACIF Payment (5) Enter the amount that is paid to a registered body for training leave for limited contract employees.

Group E - Prof. & DIF Financing (Professionalization and *Droit Individuel a la Formation*[Individual Training Rights])

Participation Rate (7) Enter the rate applied to the Total Annual Salaries to calculate the amount that the company should spend on professionalization periods and contracts, and DIF. This rate equals 0.5 by default.

OPCA Payment (Prof. DIF) (9) Enter the amount that is paid to a registered body for professionalization periods and contracts, and DIF.

Group F - Training Plan Financing

OPCA CIF (DIF) payment (f) Enter the amount that is paid to a registered body for training leaves (which are also DIF).

OPCA -Training Plan Payment (g) Enter the amount that is paid to a registered body for trainings defined in the training plan.

Subsidy (i) Enter the amount of subsidy granted for training purposes. The subsidy should be granted by government bodies (received by the company) during the declaring year.

Group G - CDD Training Leave Financing

Interface with Payroll System Select if the amount of CDD Training Leave Financing is to be retrieved from Global Payroll.

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CDD Total Annual Salaries (17) Enter the total salaries for all limited contract employees.

Employer Obligation Rate (18) Enter a percentage rate. This rate equals 1 by default. It is applied to the CDD Total Annual Salaries to calculate the amount that the company should spend on trainings for CDD.

OPCA CIF Payments (19) Enter the amount that is paid to a registered body for training leave for limited contract employees.

Group H - Public Revenue Dept Payment

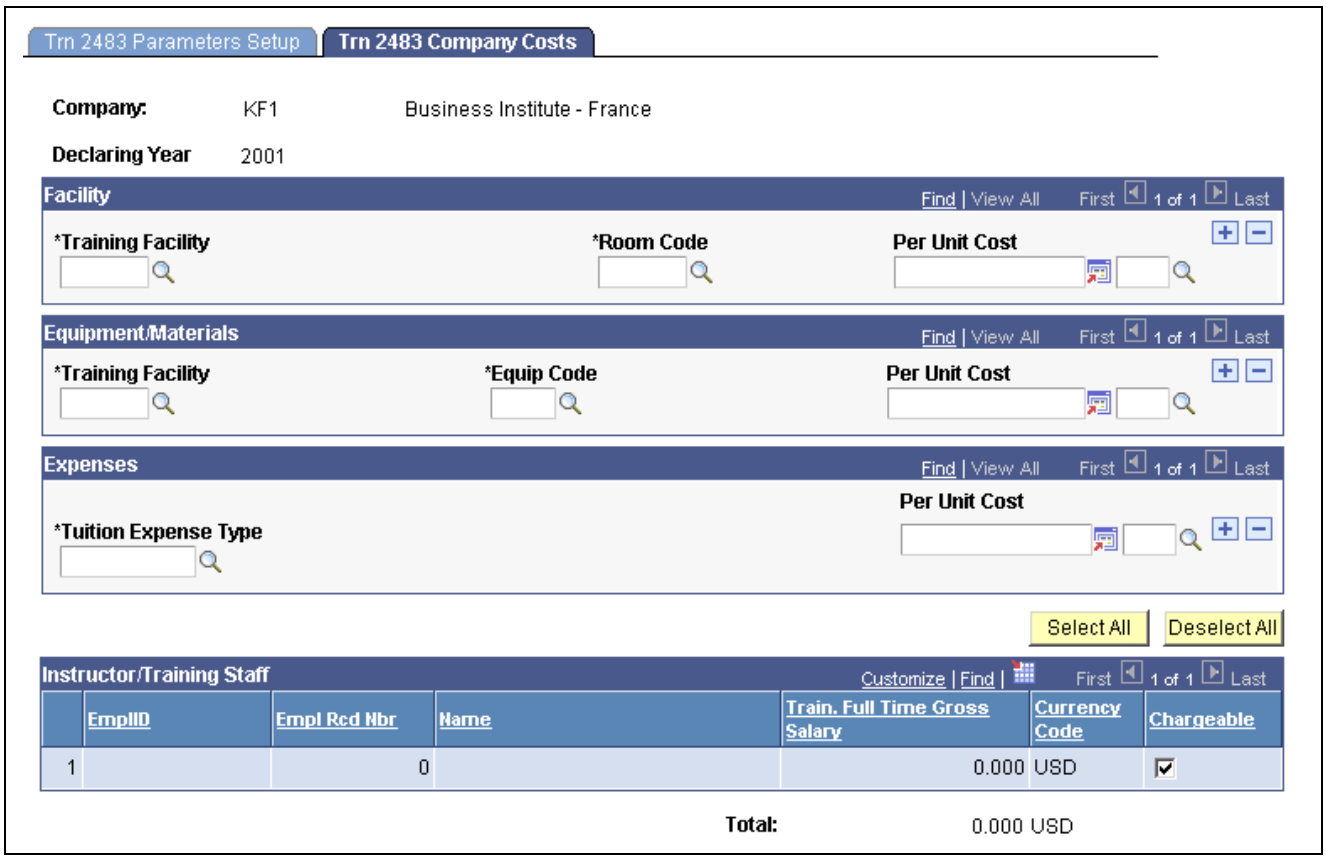
Regularization Payment (22) If your organization hasn't spent the required training amounts declared in previous 2483 reports (because the corresponding trainings were supposed to cover several years) , you must make a regularization payment to the French authorities. Enter the amount of the payment.

Payment/Company Work Council Enter the number of attached documents for the declaration report.

L. 951-8 not fulfilled Select this option when you know that this law does not apply.

Entering Company Costs

Access the Trn 2483 Company Costs page.



Trn 2483 - Company Costs page

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Note. Most training costs are processed through the Compute Student Cost process and are then available at the employee level. These costs (available in the Maintain Student Cost pages) are used to calculate most financial indicators of the 2483 report. However, certain company costs such as facility, equipment and materials expenses go directly on the 2483 report without any conversion or calculation. Use this page to charge these costs to the declaring company no matter what the length of the training session or number of students. Be sure to set Cost Unit Type on the Cost Unit Table page to *Company*.

See Chapter 3, "Setting Up Training Costs," page 39.

Facility

Training Facility Enter the training facility where training was provided.

Room Code Enter the room code where training occurred. Each room in a training facility must have a unique room code.

Equipment/Materials

Training Facility Enter the training facility where training equipment and materials will be used.

Equip. Code Enter the equipment code of equipment and materials used for training.

Expenses

Tuition Expense Type Define miscellaneous expenses that are associated with a training session.

Instructor/Training Staff

Chargeable Instructor/Training Staff salaries are retrieved automatically and the check box is selected by default. You may clear this check box for rows that you do not wish to be included in the 2483 report.

This group box links to the Trainees Salary Costs page. Employees that appear in this section (those defined as Full Time Instructor and training staff employees that are fully dedicated to the training department) are chargeable. To confirm that their annual total compensation appears on the 2483 report, select the Chargeable check box.

Click the Select All button to set all employees to chargeable at once.

Running the Report Process and Reviewing Results

This section discusses how to:

- Run the Compute Training Report (DEC2483) process.
- Review and edit process results.

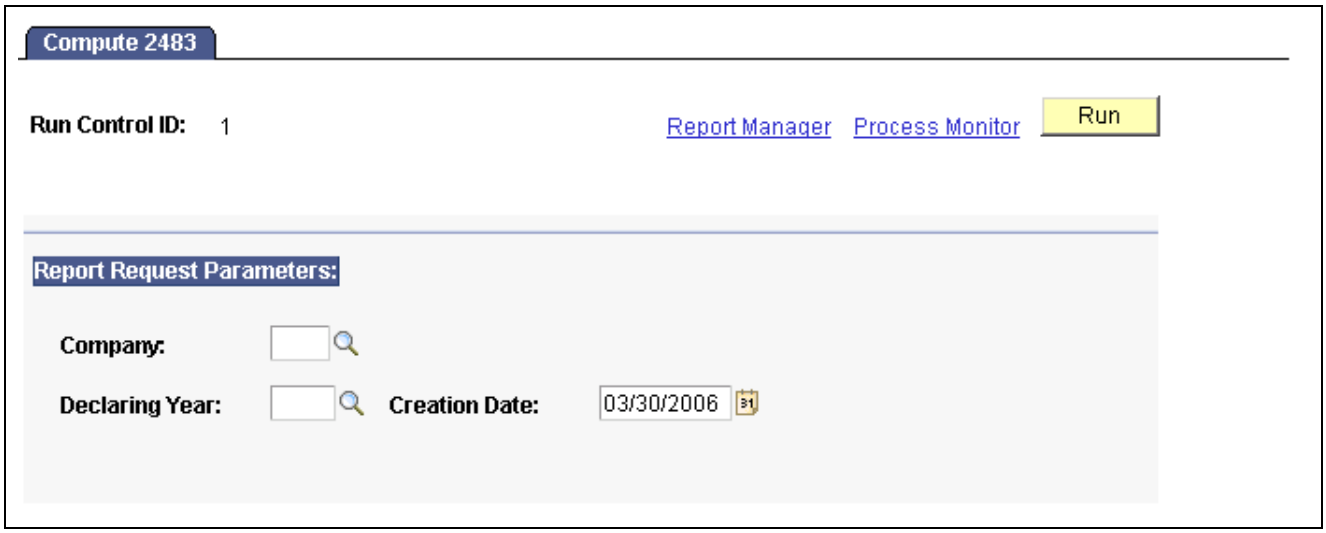
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Pages Used to Run the Report Process and Review Results

Page Name	Object Name	Navigation	Usage
Compute 2483	RUNCTL_DEC2483	Enterprise Learning, Training Reports, Compute 2483 FRA, Compute 2483	Run the Compute Training Report 2483 process.
Edit 2483	EDIT_2483_FRA	Enterprise Learning, Training Reports, Edit 2483 FRA, Edit 2483	Review and edit the results of the calculations that are run by the Compute Training Report process on each of the indicators.

Running the Compute Training Report Process

Access the Compute 2483 page.



Compute 2483 page

Run this process once you have entered all the training report group and indicator information.

Company Select the company that is to run the French Training Report 2483.

Declaring Year Enter the calendar year that the system is to use to determine cost information for that report.

Warning! This process will override any previous results. You may lose any modifications that you made manually

See Also

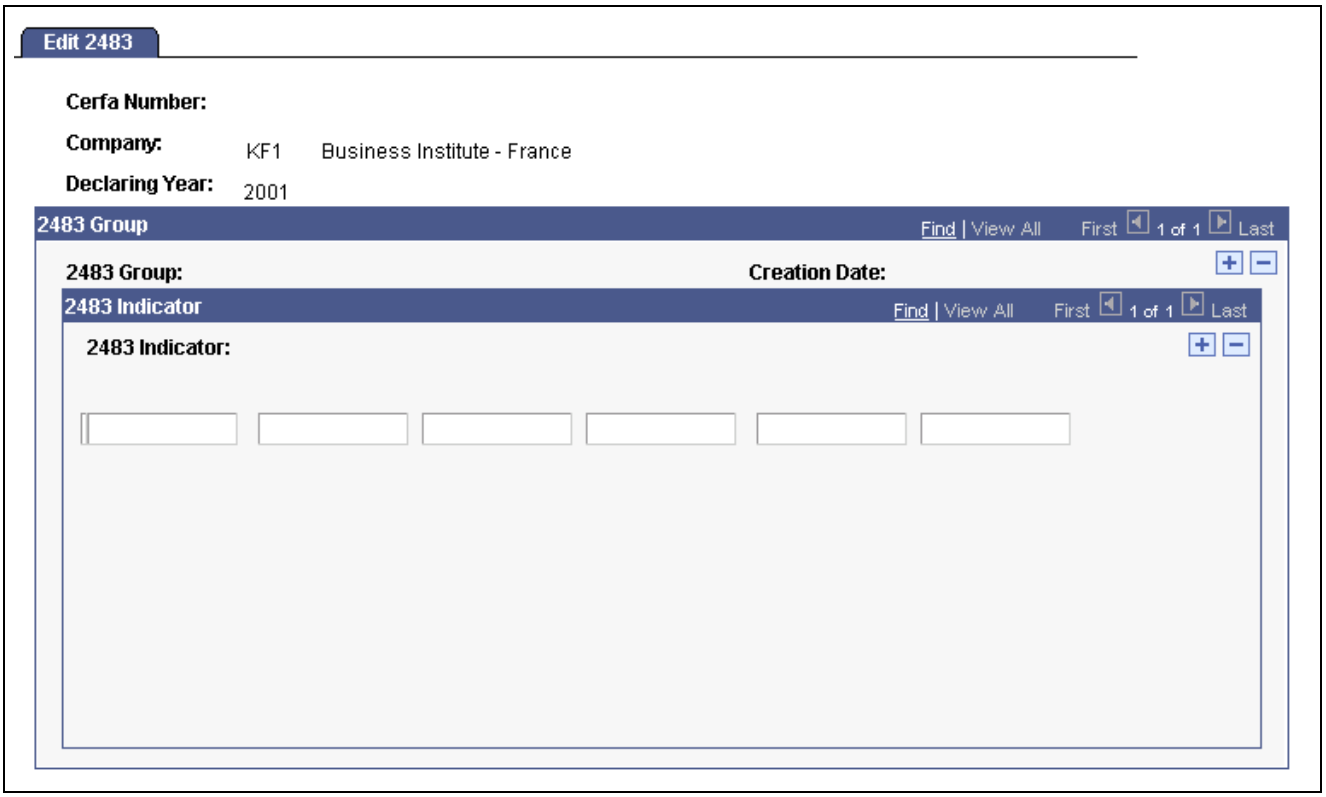
PeopleTools PeopleBook: PeopleSoft Application Engine

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Reviewing and Editing Process Results

Access the Edit 2483 page.

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Edit 2483 page

You can edit any amount on this page.

Some indicators cannot be calculated. For those indicators, compile the information manually and use this page to enter it into the system.

Note. If you rerun the Declaration 2483 process after making edits to the amounts on this page, the system overwrites the edits that you made to the Declaration 2483 results prior to rerunning the Declaration 2483 process.

See Also

Chapter 12, "(FRA) Producing the French Training Report 2483," Entering Additional Report Parameters, page 225

Running the Report

When you are satisfied with the results of the Compute Training Report process, complete the CERFA form and submit. The indicators that are required by the French government are calculated by Human Resources and tabulated in this Crystal report.

Note. If you rerun the Declaration 2483 process after making edits to the amounts on this page, the system overwrites the edits that you made to the Declaration 2483 results prior to rerunning the Declaration 2483 process.

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Page Used to Run the Report

Page Name	Object Name	Navigation	Usage
Report Training 2483	RUNCTL_TRN029	Enterprise Learning, Training Report, 2483 Tax Declaration FRA, Report Training 2483	Compiles results of calculation of the 2483 indicators for declaring vocational training of employees in French organizations. Before running this report, run the Compute Training Report 2483 (DEC2483) process to calculate the indicators. Check the calculation results and do any updating on the FRA Edit 2483 - Edit 2483 page.

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CHAPTER 13

(MEX) Running Mexican Training Reports

This chapter provides an overview of Mexican training requirements and discusses how to run Mexican training reports.

Understanding Mexican Training Requirements

As a company operating in Mexico, you are required to create training and development plans for your employees. The plan consists of identifying courses and events that meet the training and development needs of the workforce. Each course or event should have a detailed description of the objective and activities. Training can be internal or external.

In Mexican companies, a mixed committee is formed to oversee the training and development process for employees. The mixed committee is made up of an equal number of employee and employer representatives and is selected annually. You define details for the mixed committee on the Mixed Committee page.

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

Depending on the type of training, there are specific legal forms to fill out. With Administer Training, you can generate reports to comply with the legal forms required by the government. This chapter discusses the various statutory reports.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Monitor Health and Safety, "Creating and Tracking Incidents"

Common Elements Used in This Chapter

Mixed Committee When entering information for training reports, the Mixed Committee you select must be of a Training type.

Contract Type Specify the contract type by selecting *Individual, Collective,* or *Law.*

Plan Type Select the type of training program or course that you want to generate the report for.

Running Mexican Training Reports

This section discusses how to:

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- Run the DC-1 reports.
- Run the DC-2 reports.
- Run the DC-2B reports.
- Run the DC-3 reports.
- Run the DC-4 reports.
- Run the DC-5 reports.

Pages Used to Run Mexican Training Reports

Page Name	Object Name	Navigation	Usage
DC-1 Format	RUNCTL_STP001	Enterprise Learning, Training Reports, STPS DC-1 Format MEX, DC-1 Format	This page is used to run the MXSTPP001 (format) and MXS TP—2 (reverse) reports.
DC-2 Format	RUNCTL_STP003	Enterprise Learning, Training Reports, STPS DC-2 Format MEX, DC-2 Format	This page is used to run the MXSTP003 (format) and MXSTP004 (reverse) reports.
DC-2B Format	RUNCTL_STP005	Enterprise Learning, Training Reports, STPS DC-2B Format MEX, DC-2B Format	This page is used to run the (MEX) DC-2B Training and Development Registration Application (MXSTP005) reports.
DC-3 Format	RUNCTL_STP006	Enterprise Learning, Training Reports, STPS DC-3 Format MEX, DC-3 Format	This page is used to run the DC 3 Courses/Events Certificates (MXSTP006) reports.
DC-4 Format	RUNCTL_STP007	Enterprise Learning, Training Reports, STPS DC-4 Format MEX, DC-4 Format	This page is used to run the MXSTP007 report.
DC-5 Format	RUNCTL_STP008	Enterprise Learning, Training Reports, STPS DC-5 Format MEX, DC-5 Format	This page is used to run the Training and Development External Registration Application MXSTP008 (format) and MXSTP009 (reverse) reports.

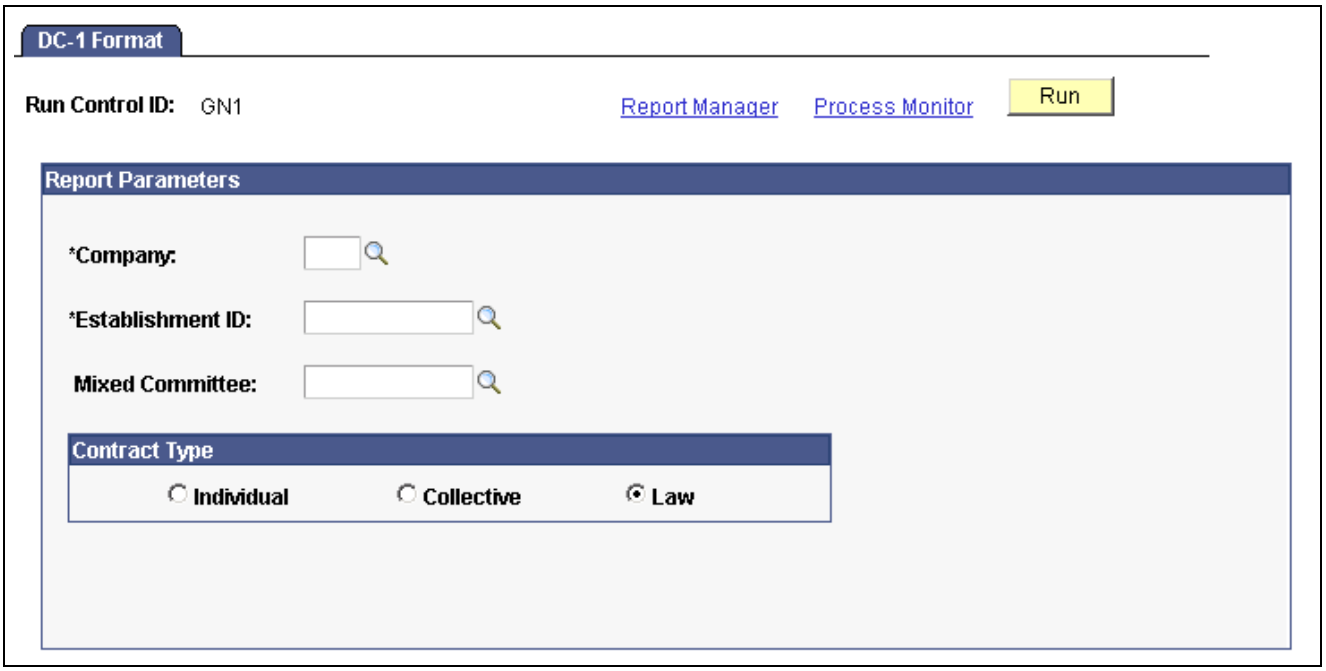
See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports," Administer Training Reports

Running the DC-1 Reports

Access the DC-1 Format page.

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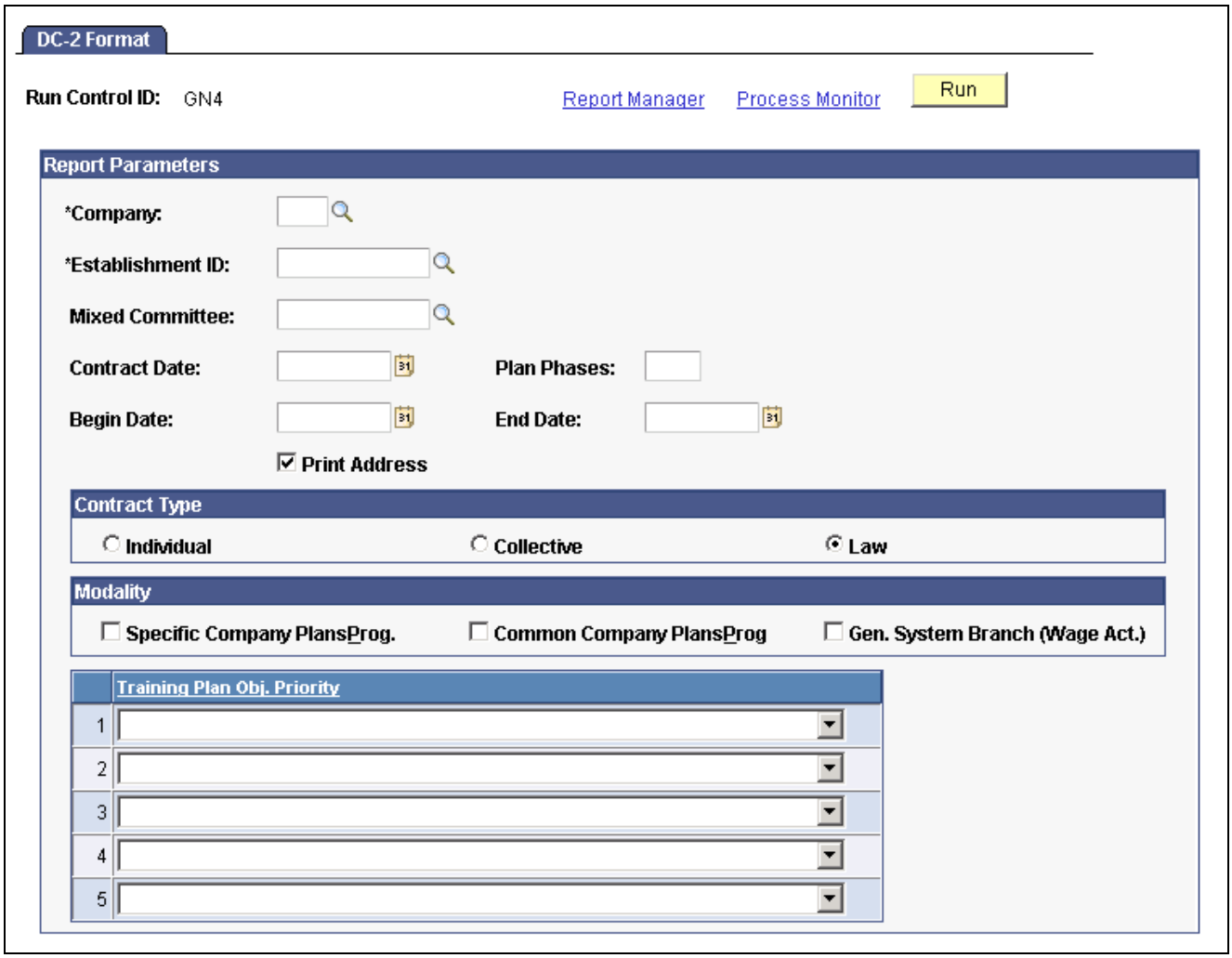


DC-1 Format page

Running the DC-2 Reports

Access the DC-2 Format page.

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DC-2 Format page

Contract Date Enter the collective contract signature date or the collective contract revision date.

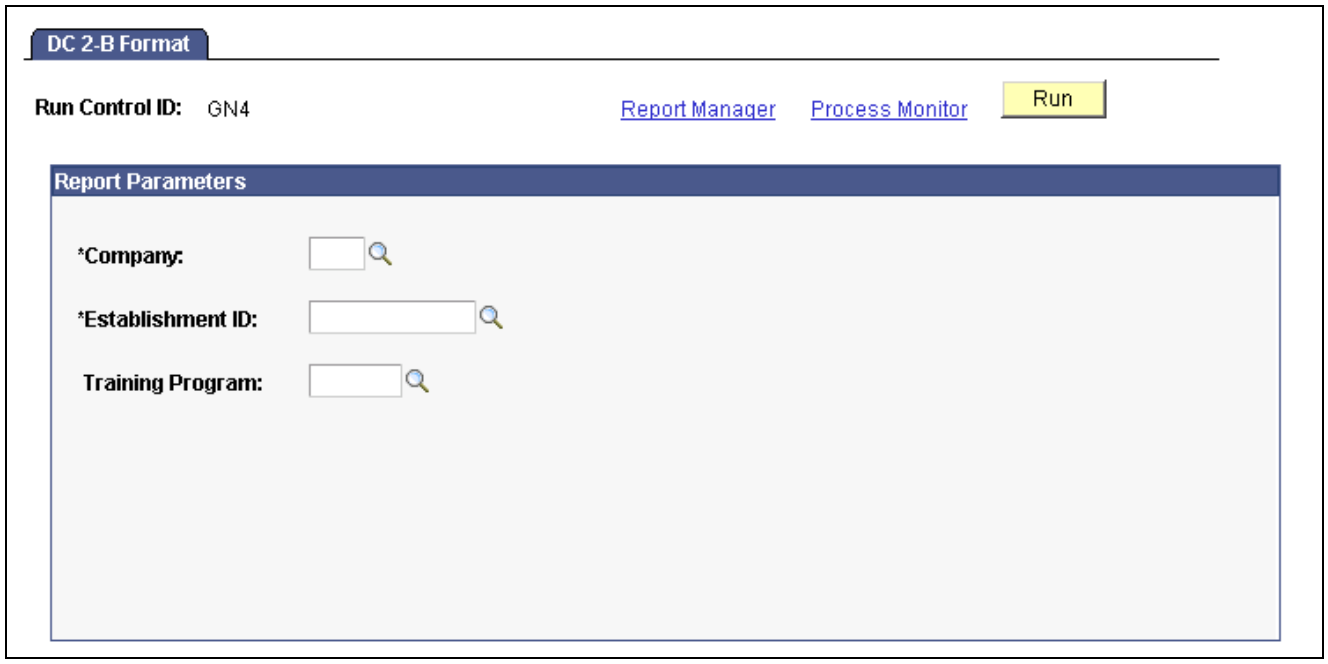
Plan Phases Define the number of phases in which you are going to run the training program plan.

Training Plan Obj. Priority (training plan objective priority) Values are *Increase Productivity, Prepare to Occupy New Vac/Pos, Prevent Work Risks, Provide New Technologies Info,* and *Upg/Improve Knowledge & Comp.*

Running the DC-2B Reports

Access the DC-2B Format page.

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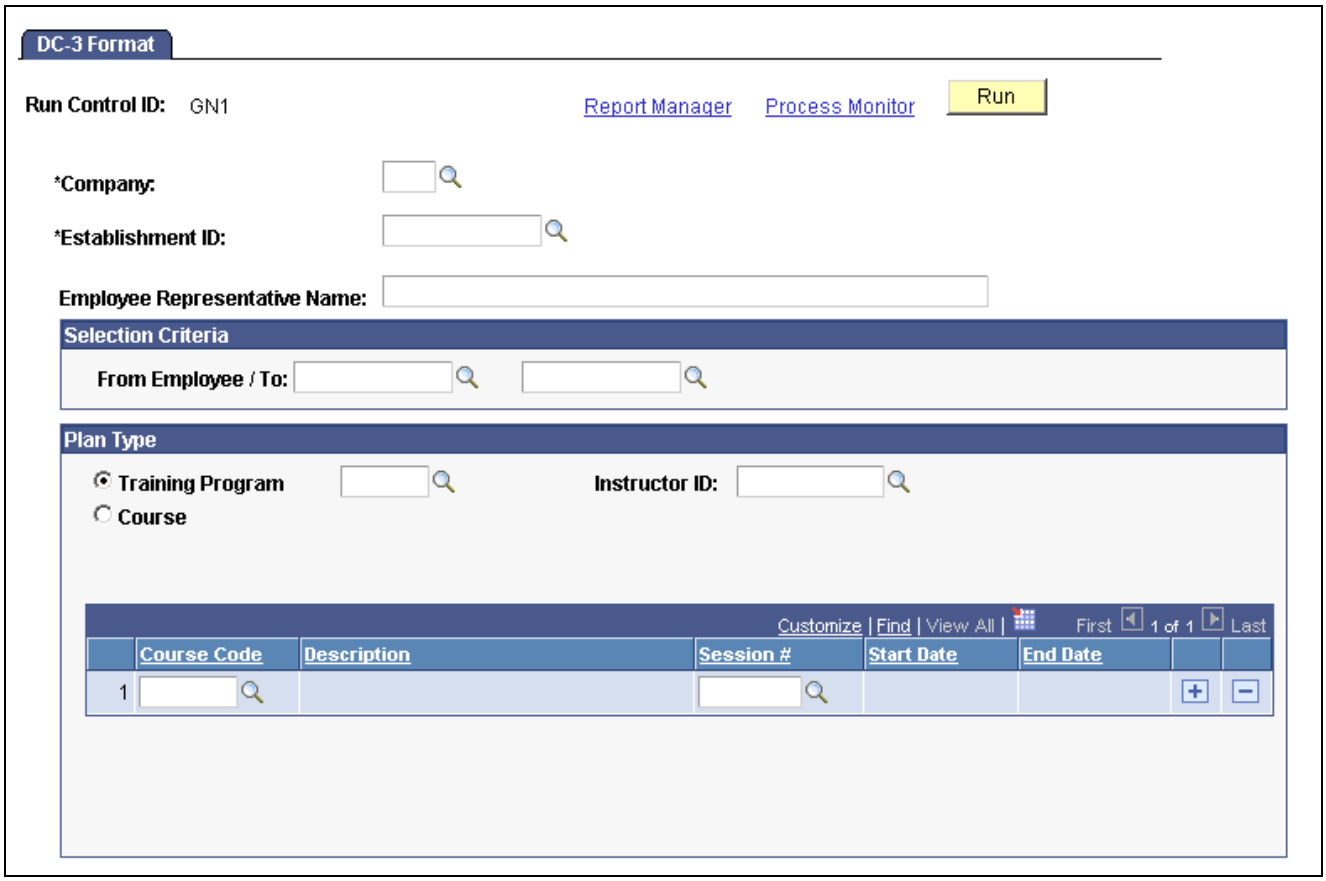
DC 2-B Format page

Training Program Select the type of training program.

Running the DC-3 Report

Access the DC-3 Format page.

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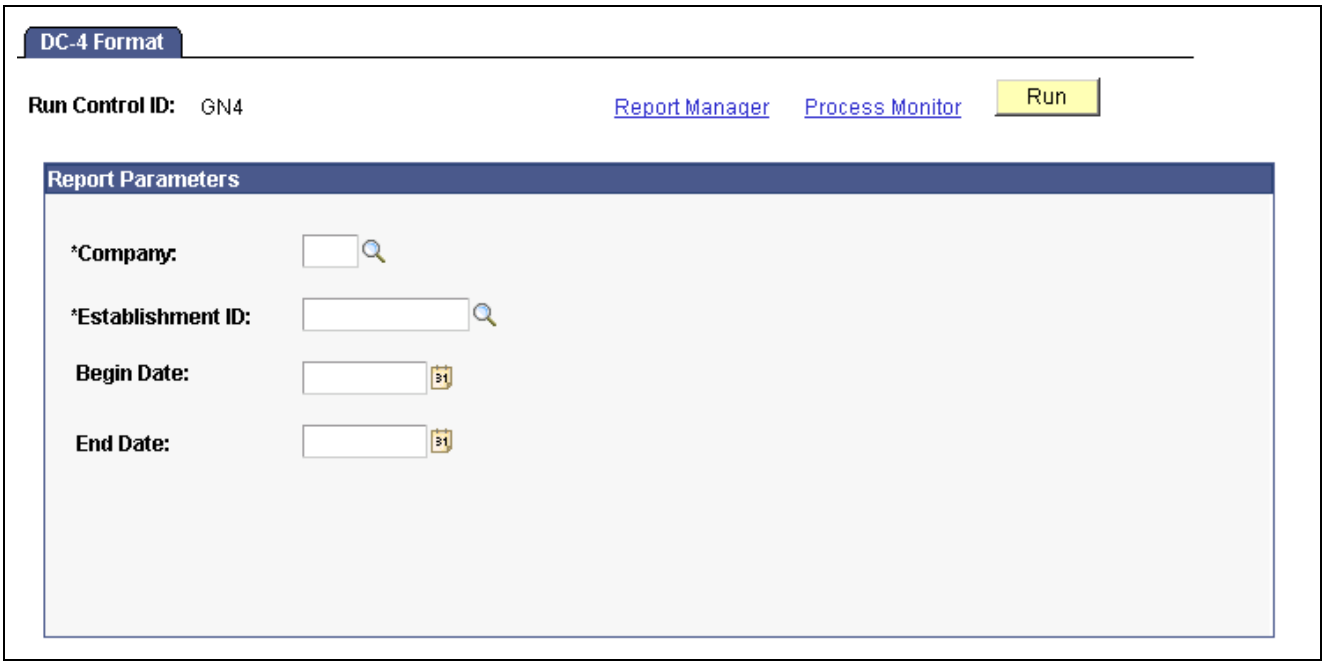
DC-3 Format page

Employee Representative Name	Enter the name of the employee representative who is on the Mixed Committee.
From Employee/To	Enter the range of employee numbers for whom this training is being provided.
Plan Type	Select the training plan type. You can select either Training Program or Course. If you select Training Program, you also need to enter the Instructor ID.
Course Code	Select the course code. The course description displays next to the course code.
Session #	Select the session number for the course being taught.
Start Date, End Date	Once you have entered the course code and session number, the system displays the start and end date for the next available course.

Running the DC-4 Reports

Access the DC-4 Format page.

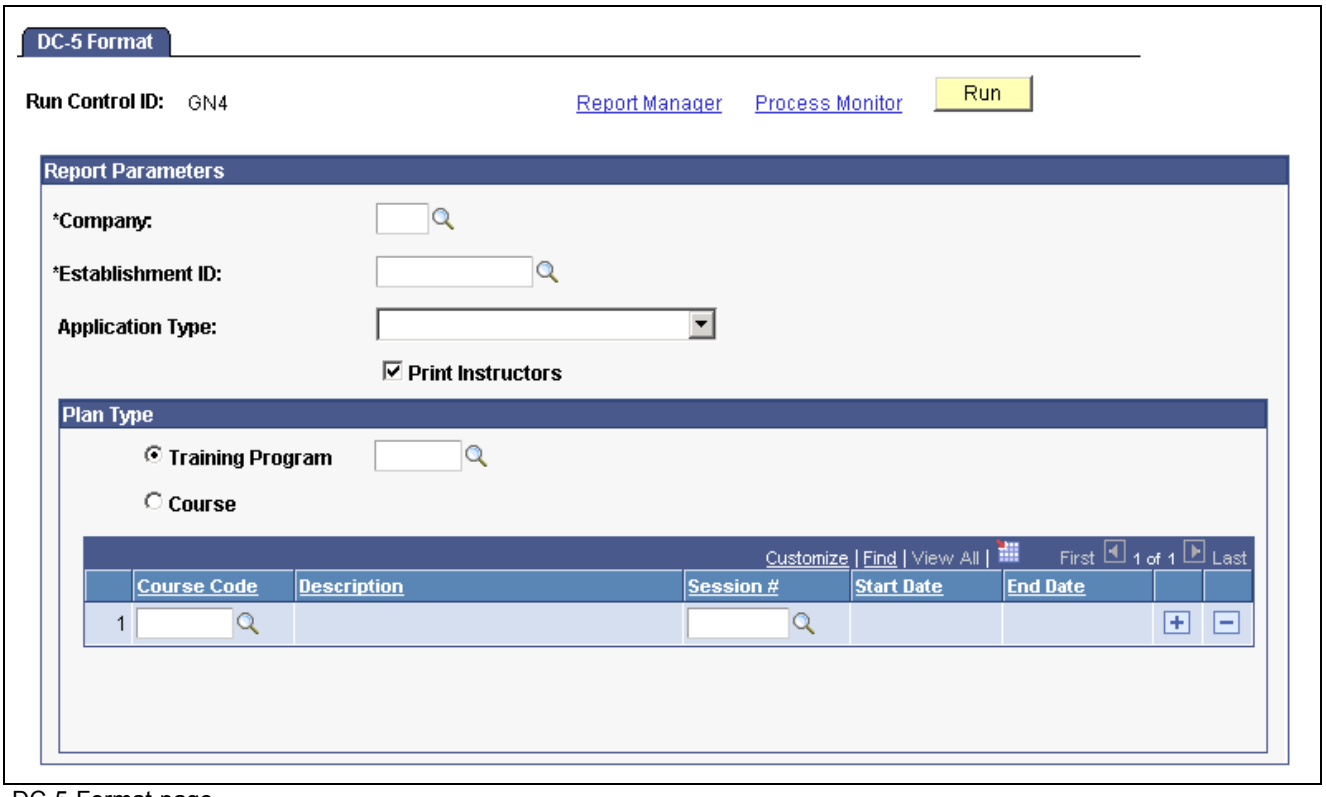
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DC-4 Format page

Running the DC-5 Reports

Access the DC-5 Format page.



DC-5 Format page

Application Type Values are *Initial, Instructor Change, New Programs,* and *Update Courses.*

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Print Instructors Select to include instructor names on the report.

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Glossary of PeopleSoft Enterprise 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.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

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 split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

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Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

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 Enterprise 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.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

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	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
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."

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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 activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise 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).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

cash drawer A repository for monies and payments taken locally.

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. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise 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.

checkbook In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

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.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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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, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft Enterprise. 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.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

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 PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

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	3C access groups so that you can assign data-entry or view-only privileges across functions. 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.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
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.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also *class.*
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
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.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

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delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt Items shipped from a warehouse or vendor to another warehouse.

direct ship Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are 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 Enterprise 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 Enterprise 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 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.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft Enterprise 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.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

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fund In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

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, and user interaction objects.

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incentive rule In PeopleSoft Enterprise 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.

incur In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

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.

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.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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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.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

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.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

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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 In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

pagelet Each block of content on the home page 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 Enterprise and non-PeopleSoft Enterprise content.

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 *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (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.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan 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.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

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	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise 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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
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.

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process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine 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 A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

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 Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise 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.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

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.

regional sourcing In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

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.

remote data source data Data that is extracted from a separate database and migrated into the local database.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

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.

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.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

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.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

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.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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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.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise 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.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

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.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

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 time period In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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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.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

task A deliverable item on the detailed sourcing plan.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

trace usage In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

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 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.

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 Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.

universal navigation header Every PeopleSoft Enterprise 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.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise 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.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
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.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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